Guidebook for Export to Japan (Food Articles) 2011
<Seafood and Processed Products>

Japan External Trade Organization (JETRO)

Development Cooperation Division
Trade and Economic Cooperation Department

March, 2011

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Published in March 2011

Written and Published by:
Japan External Trade Organization (JETRO)
Development Coopelation Division
Trade And Economic Coopelation Department

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9. Seafood and Processed Products

This chapter defines seafood and processed products according to the H.S. code of the Tariff Schedule (Fig. 9-1), covering imports as well as canned marine products and processed paste products that are distributed in Japan. Live seafood is not discussed in this chapter.

Fig. 9-1: Scope of coverage for seafood and processed products in this chapter

Category	Description	H.S. code
Shrimps	Rock lobster and other sea crawfish (Palinurus spp., Panulirus spp., Jasus spp.)	0306.11,21
	Lobsters (Homarus spp.)	0306.12,22
	Shrimps and prawns	0306.13,23
	Other shrimps	0306.19-010, 0306.29-110,210
Crabs	King crabs	0306.14-010,0306.24-110
	Snow crabs (Chionoecetes spp.)	0306.14-020,0306.24-121,129
	Swimming crabs (Portunus spp.)	0306.14-030,0306.24-130
	Horsehair crabs	0306.14-040,0306.24-140
	Other crabs	0306.14-090,0306.24-150,190,200
Tunas (of the genus Thunnus)	Albacore or longfinned tunas (Thunnus alalunga)	0302.31,0303.41
	Yellowfin tunas (Thunnus albacares)	0302.32,0303.42
	Skipjack or stripe-bellied bonito	0302.33,0303.43
	Bigeye tunas (Thunnus obesus)	0302.34,0303.44
	Bluefin tunas (Thunnus thynnus)	0302.35,0303.45
	Southern bluefin tunas (Thunnus maccoyii)	0302.36,0303.46
	Other	0302.39,0303.49
	Tunas (of the genus Thunnus), fillets	0304.19,29
	Fish meat of tunas	0304.99.991,994,999 Note)
Fish roes	Hard roes of Nishin (fresh, chilled, fronzen)	0302.70-010,0303.80-010
	Hard roes of Nishin (dried, smoked, salted or in brine)	0305.20-010
	Hard roes of Nishin (prepared)	1604.20-011,012
	Hard roes of Tara (fresh, chilled, fronzen)	0302.70-020,0303.80-020
	Hard roes of Tara(dried, smoked, salted or in brine)	0305.20-020
	Hard roes of Tara (prepared)	1604.20-015
	Hard roes of Salmonidae (dried, smoked, salted or in brine)	0305.20-030
	Nishin roes on the tangles (dried, smoked, salted or in brine)	0305.20-040
	Other fish roe (fresh, chilled, fronzen)	0302.70-090,0303.80-090
	Other fish roes (dried, smoked, salted or in brine)	0305.20-090
	Other fish roes (prepared)	1604.20-019
	Ikura	1604.30-010
	Caviar and caviar substitutes	1604.30-090
Processed seafood	Dried fish (Salmonidae)	0305.59-010
	Dried fish, Nishin (Clupea spp.), Tara (Gadus spp., Theragra spp. and Merluccius spp.), Buri (Seriola spp.), Aji (Trachurus spp. and Decapterus spp.) and Samma (Cololabis spp.)	0305.59-020
	Dried fish (other)	0305.59-090
	Other prepared fish	1604.20-020
Molluscs	Octopus (Octopus spp.)	0305.51,0305.59-100
	Octopus (Octopus spp.) prepared	0305.59-200

Note) Category 0304.99.999 is included in Tunas because most products in the category are considered tunas.

I. Points to Note in Exports to and Sales in Japan

1. Relevant Laws and Institutional Regulations

(1) Regulations and Procedural Requirements for Importing to Japan

Importing of seafood and processed products is regulated primarily by the following laws: 1) the Foreign Exchange and Foreign Trade Act, 2) the Food Sanitation Act, and 3) the Customs Act.

<Foreign Exchange and Foreign Trade Act>

Importing seafood is subject to restrictions, as described in the following:

- Import quota - Import approval - Import acknowledgment (prior acknowledgment / acknowledgment at customs clearance)

a) Import quota

The following kinds of seafood are recognized as being subject to import quota under the Foreign Exchange and Foreign Trade Act, and importers of such kinds of seafood must obtain import quota and import approval from the Trade Minister:

[Subjects]

- Herring (nishin), cod (tara), yellowtail, mackerel, sardines, horse mackerel, saury, scallops, scallop eyes, squid, etc. (live, fresh, chilled, frozen, filleted, or dried)

There are four modes of allocation including trading firm allocation (allocation based on past records), fishery operator allocation, consumer allocation, and first-come basis allocation. New importers without past import experience shall in principle apply for the first-come basis allocation (allocation may be made by drawing); otherwise they may receive re-allocation from those that already have an allocation.

b) Import approval

To import the following kinds of seafood, import approval must be obtained in advance from the Trade Minister:

[Subjects]

- Bluefin tuna (those farmed in the Atlantic Ocean or the Mediterranean Sea and stored fresh/chilled)
- Southern bluefin tuna (those stored fresh or chilled, excluding those from Australia, New Zealand, the Philippines, South Korea, or Taiwan)
- Bigeye tunas and prepared bigeye tunas (those from Bolivia/Georgia) and fish, crustaceans, and other aquatic invertebrates and prepared food made from such, and animal-based products using fish, crustaceans, and mollusks

c) Advance acknowledgment:

To import the following kinds of seafood, a note of acknowledgment must be obtained from the Trade Minister prior to importing cargo:

[Subjects]

- Frozen bluefin, southern bluefin, and bigeye tuna, and swordfish
- Tuna (excluding albacore, bluefin, southern bluefin, and bigeye tuna) and marlin (excluding swordfish) that are imported by ship (stored fresh / chilled / frozen)

d) Acknowledgment at customs clearance

To import the following kinds of seafood, required documents must be submitted including a certificate of statistics, fishing certificate, and certificate of re-export to obtain acknowledgment by customs:

[Subjects]

- Bluefin tuna (fresh / chilled)
- Southern bluefin tuna (fresh / chilled)
- Swordfish (fresh / chilled)

<Food Sanitation Act>

In compliance with Notification No. 370 of the Ministry of Health, Labour and Welfare, "Standards and Criteria for Food and Additives" issued under the Food Sanitation Act, and the standards for pesticide residues, etc. (including feed additives and drugs for animals) which are included therein, seafood and processed products are subject to food sanitation, which is conducted to assess the types and details of the raw ingredients, and to test the types and contents of additives, pesticide residues, mycotoxins, and so on. Import bans may be imposed on food in the event of an additive, pesticide, or other contents which are prohibited in Japan, when their levels exceed approved limits, or when the presence of mycotoxins, etc. is above allowable levels. Accordingly, seafood and processed products should be checked at the production site prior to import. If levels exceed the limits of Japanese standards, guidance should be given.

Pesticide residue standards adopted a negative system until 2006, under which pesticides would not be subject to control if there was no requirement for them. Amendments to the law introduced a positive list system, however, and the distribution of products is now prohibited in principle if they contain a specific level of pesticides, etc. even if there is no established requirement. The positive list system applies to all food items, including seafood whether wild or farmed.

As of 2011, of the seafood that are subject to compulsory testing by order of the Health Minister (all-lot inspection that importers are ordered by the Health Minister to perform for food items that have a high potential to be in violation of the Food Sanitation Act), items subject to compulsory testing regardless of the country of origin include salmon roe and blowfish. In addition, farmed shrimps and prawns produced in Thailand (oxolinic acid), shrimps and prawns produced in Vietnam (chloramphenicol, nitrofurans, etc.) are also subject to compulsory testing.

Approved (upper) limits applicable in the aforementioned testing are 0.002 ppm for fenitrothion and 0.01 ppm for oxolinic acid, acetochlor, and triazophos; nitrofurans and chloramphenicol must not be detected in food.

<Customs Act>

Under the Customs Act, the importing of cargo with labeling that falsifies the origin of the contents, etc. is banned.

(2) Regulations and Procedural Requirements at the Time of Sale

There is no specific law applicable to the sales of seafood and processed products. Regulations relevant to sales are summarized below.

<Food Sanitation Act>

Under the Food Sanitation Act, sales of products that contain harmful or toxic substances or those with poor hygiene are prohibited. Sales of seafood and processed products in containers and packaging are subject to mandatory labeling under the Food Sanitation Act, and provisions concerning safety labeling such as indication of food additives, allergy information, raw ingredients and source, and genetic modification, etc. are applicable.

<Product Liability Act>

Fishery products (which include a wide range of products except unprocessed) are subject to the Product Liability Act, and care should be taken with regard to the safety management of relevant contents, containers, and packaging in relation to issues such as food poisoning.

The Product Liability Act stipulates the liability of manufacturers, etc. for damages to consumers in association with product defects, and importers are included in the category of manufacturers, etc. This is based on a policy to make importers liable for damages because it is difficult for victimized consumers to hold overseas manufacturers liable for damages. Claims for compensation against overseas manufacturers are considered to be a matter for the importer to make, independent of the Product Liability Act.

<Act on Specified Commercial Transactions>

The Act on Specified Commercial Transactions stipulates the protection of interest of purchasers in the direct commercial transactions made with consumers. Sales of seafood and processed products in such routes as mail-order, direct marketing, telemarketing, etc. are subject to provisions of the Act on Specified Commercial Transactions.

<Act on the Promotion of Sorted Garbage Collection and Recycling of Containers and Packaging>

Under the Act on the Promotion of Sorted Garbage Collection and Recycling of Containers and Packaging, importers, etc. that sell contents using containers and packaging that are controlled by the Act (paper containers and packaging and plastic containers and packaging, etc.) shall be liable for recycling (however, small-scale enterprises of below a certain size are excluded from among enterprises subject to the Act).

2. Procedures

(1) Procedures for Authorization of Importing and Sales

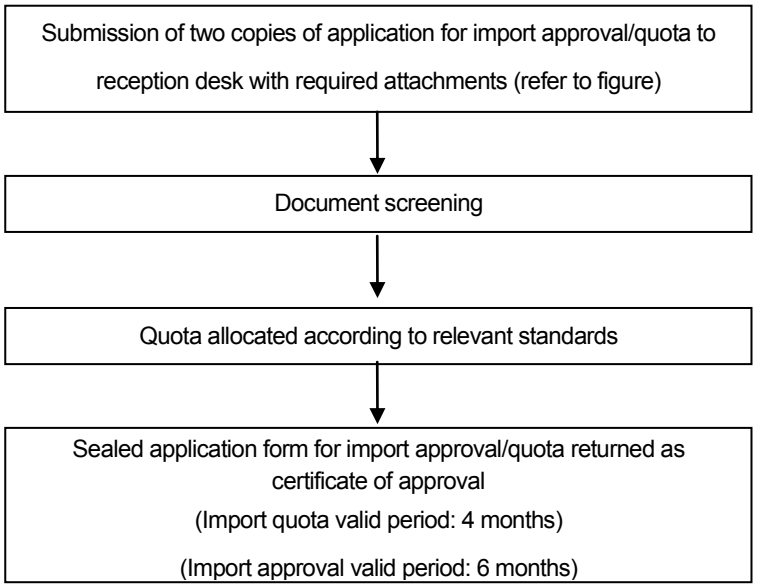
<Import Control>

a) Import quota

Necessary information on import quota is published in the gazette and websites of the Ministry of Economy, Trade and Industry, including qualification for application, allocated quantities, date for application, applicable place of origin (import is not allowed from countries not on the list), based on which an application must be made.

Key procedures are as shown in the flowchart in Fig. 9-3; an application for import quota must be submitted in advance to the Trade Minister (through Agricultural and Marine Products Office, Trade Control Department, Trade and Economic Cooperation Bureau). After receiving a returned officially sealed application form, the importing procedure will be started.

Fig. 9-2: Flowchart of import quota application

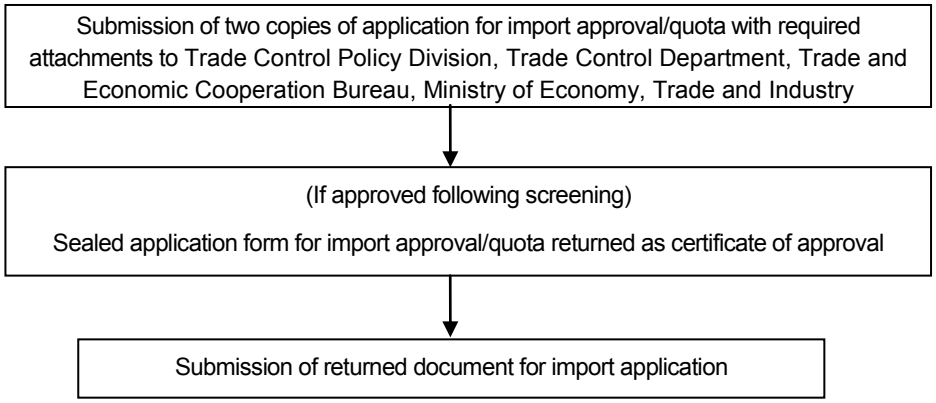


Source: Ministry of Economy, Trade and Industry

b) Import approval

Key procedures are as shown in the flowchart in Fig. 9-3; an application for import acknowledgment must be submitted in advance to the Trade Minister (through Trade Control Department, Trade and Economic Cooperation Bureau). After receiving a returned officially sealed application form, the importing procedure will be started.

Fig. 9-3: Flowchart of import approval application



Source: Ministry of Economy, Trade and Industry

c) Import acknowledgment

To import tuna by ship (excluding albacore, bluefin, southern bluefin, and bigeye tuna), the required documents (refer to the subsequent section) must be submitted to apply for acknowledgement. After receiving a notice of acknowledgment issued by the Trade Minister, the importing procedure will be started.

To import fresh or chilled bluefin tuna, southern bluefin tuna, and swordfish excluding the aforementioned, the certificate must be submitted to customs to have import acknowledgment.

<Food Sanitation Inspection>

Under the Food Sanitation Act, the required documents (refer to the subsequent section) must be submitted when filing an application for inspection with the imported food monitoring departments of Quarantine Stations, Ministry of Health, Labour and Welfare. Inspection is conducted where it has been decided necessary to check the standards and criteria or safety issues at the initial review stage. If, as a result of the initial review and inspection, no issue has been detected under the Act, the registration certificate is returned, which the applicant shall submit, along with customs documents, upon filing an application

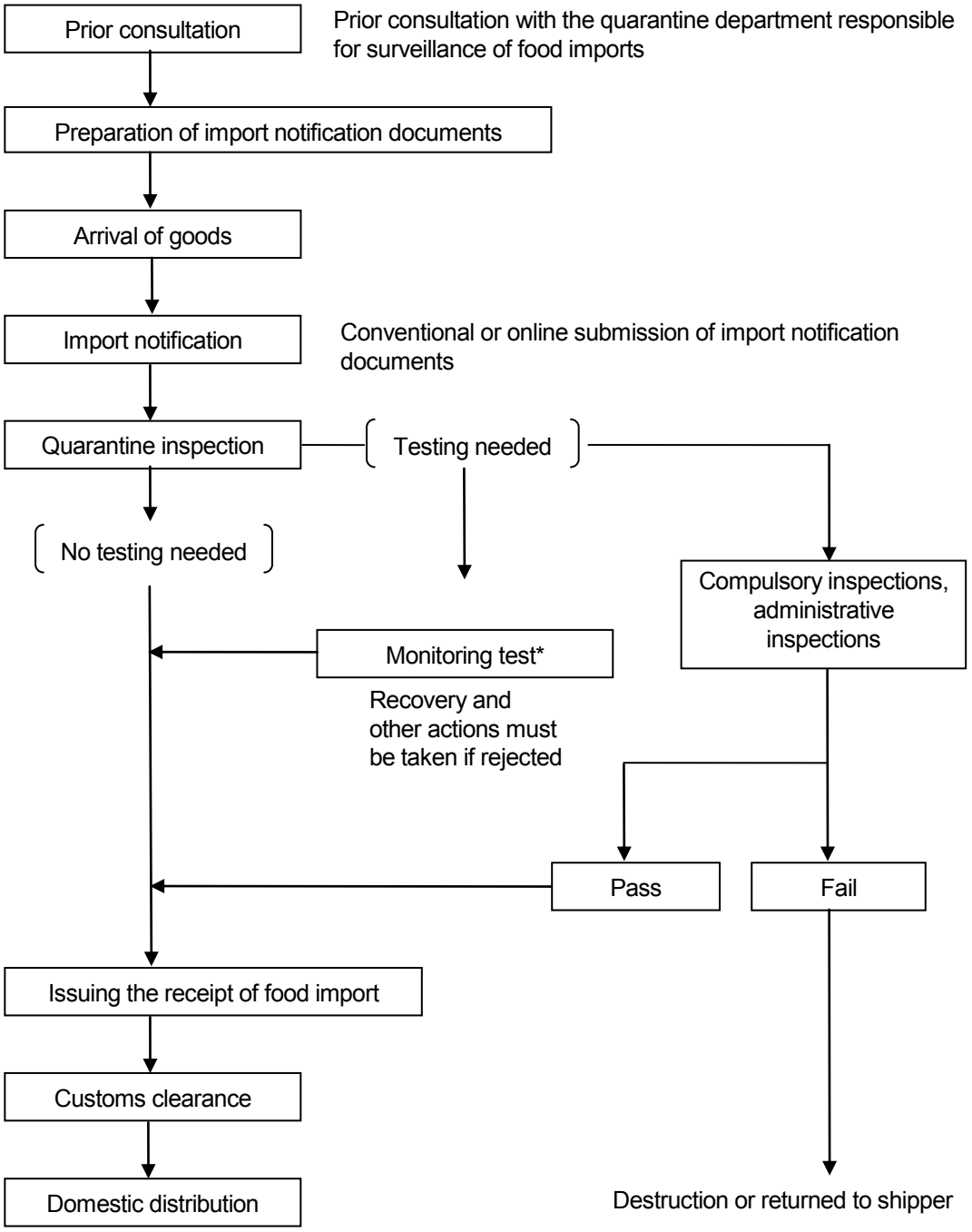
for import with Customs. In the event that it has been ruled unfit for importing, measures such as destruction or return to the shipper are taken (Fig. 9-5).

<Customs>

Under the Customs Business Act, import declaration must be made by importers themselves or commissioned to those qualified as registered customs specialists (including customs brokers).

To accept the entry into Japan of incoming cargo arriving from a foreign country, an import declaration must be made to the competent Customs office for the bonded area where the cargo is stored. Cargo for which customs inspection is required shall undergo required inspections first, and upon payment of customs duty, national and local consumption taxes, an import permit may be given in principle.

Fig. 9-4: Flowchart of import procedure



Source: Ministry of Health, Labour and Welfare
* Import food inspection following notification, conducted by MHLW Quarantine Stations according to the annual plan.

(2) Required Documents

Documents required for importing are summarized below in Fig. 9-5 according to the authorities to which each document is submitted.

Fig. 9-5: Documents required for import clearance

Submitted to	Required documents	Seafood	Processed products
<Import quota>*1 Agricultural and Marine Products Office, Trade Control Policy Division, Trade Control Department, Trade and Economic Cooperation Bureau, Ministry of Economy, Trade and Industry	Application form for import approval/quota	△	—
<Import approval>*2 Agricultural and Marine Products Office, Trade Control Policy Division, Trade Control Department, Trade and Economic Cooperation Bureau, Ministry of Economy, Trade and Industry Far Seas Fisheries Division, Resources Management Department, Fisheries Agency	Application form for import approval/quota	△	—
	Import agreement	△	—
	Acknowledgement by Fisheries Agency	△	—
<Import acknowledgement (before customs clearance)>*3 Agricultural and Marine Products Office, Trade Control Policy Division, Trade Control Department, Trade and Economic Cooperation Bureau, Ministry of Economy, Trade and Industry	Application form for acknowledgement	△	—
<Import acknowledgement (upon application for customs clearance)>*4 Agricultural and Marine Products Office, Trade Control Policy Division, Trade Control Department, Trade and Economic Cooperation Bureau, Ministry of Economy, Trade and Industry	Bluefin tunas statistics certificate*5	△	—
	Southern bluefin tunas statistics certificate*5	△	—
Imported food monitoring departments of Quarantine Stations, Ministry of Health, Labour and Welfare (Food sanitation inspection under the Food Sanitation Act)	Notification form for importation of foods	—	○
	Material/ingredient table	—	○
	Production flow chart	—	○
	Table of analysis results issued by the designated inspection institute (if there is a past record of import)	—	○
Local customs offices (Customs clearance under the Customs Act)	Declaration of import	○	○
	Invoice	○	○
	Packing list	○	○
	Bill of lading (B/L) or airway bill	○	○

Source: Ministry of Economy, Trade and Industry, Ministry of Health, Labour and Welfare, Ministry of Finance

*1: For importing non-liberalized items.

*2: For importing the following items: (1) salmon, trout, and prepared food; (2) fish, crustaceans, mollusks, and seaweed; (3) food products whose country of origin or registry is identified to be specified countries/regions such as Iraq, Belize, Honduras, and Equatorial Guinea; (4) plants, animals, and processed food, listed in Appendices II and III, Convention on International Trade in Endangered Species of Wild Fauna and Flora (CITES)

*3: For importing tuna, marlin, etc.

*4: For importing fresh or chilled blufin tuna or southern bluefin tuna

*5: The document includes comprehensive information on any transaction such as records of trading bluefin or southern bluefin tuna, which in principle requires acknowledgement by the authority of the flag state of the fishing boat that caught the tuna or industrial organization in fisheries of the country.

3. Competent Authorities

Fig. 9-6: Contacts of competent authorities

Foreign Exchange and Foreign Trade Act		
	Trade Control Policy Division, Trade Control Department, Trade and Economic Cooperation Bureau, Ministry of Economy, Trade and Industry	TEL: +81-3-3501-1511 http://www.meti.go.jp
Food Sanitation Act		
	Inspection and Safety Division, Department of Food Safety, Pharmaceutical and Food Safety Bureau, Ministry of Health, Labour and Welfare	TEL: +81-3-5253-1111 http://www.mhlw.go.jp
Customs Tariff Act /		
	Customs and Tariff bureau, Ministry of Finance Japan	TEL: +81-3-3581-4111 http://www.mof.go.jp
Act for Standardization and Proper Labeling of Agricultural and Forestry Products		
	Labelling and Standards Division, Food Safety and Consumer Affairs Bureau, Ministry of Agriculture, Forestry and Fisheries	TEL: +81-3-3502-8111 http://www.maff.go.jp
Measurement Act		
	Measurement and Intellectual Infrastructure Division, Industrial Science and Technology Policy and Environment Bureau, Ministry of Economy, Trade and Industry	TEL: +81-3-3501-1511 http://www.meti.go.jp
Health Promotion Act		
	Food and Labeling Division, Consumer Affairs Agency	TEL: +81-3-3507-8800 http://www.caa.go.jp
Act against Unjustifiable Premiums and Misleading Representations		
	Representation Division, Consumer Affairs Agency	TEL: +81-3-3507-8800 http://www.caa.go.jp
Product Liability Act		
	Consumer Safety Division, Consumer Affairs Agency	TEL: +81-3-3507-8800 http://www.caa.go.jp
Act on Specified Commercial Transactions		
	Consumer Advice Office, Ministry of Economy, Trade and Industry	TEL: +81-3-3501-1511 http://www.meti.go.jp
	Consumer Safety Division, Consumer Affairs Agency	TEL: +81-3-3507-8800 http://www.caa.go.jp
Act on the Promotion of Sorted Garbage Collection and Recycling of Containers and Packaging / Act on the Promotion of Effective Utilization of Resources		
	Recycling Promotion Division, Industrial Science and Technology Policy and Environment Bureau, Ministry of Economy, Trade and Industry	TEL: +81-3-3501-1511 http://www.meti.go.jp
	Office for Recycling Promotion, Waste Management and Recycling Department, Ministry of the Environment	TEL: +81-3-3581-3351 http://www.env.go.jp
	Food Industry Policy Division, General Food Policy Bureau, Ministry of Agriculture, Forestry and Fisheries	TEL: +81-3-3502-8111 http://www.maff.go.jp
Unfair Competition Prevention Act / Trademark Act		
	Intellectual Property Policy Office, Economic and Industrial Policy Bureau, Ministry of Economy, Trade and Industry	TEL: +81-3-3501-1511 http://www.meti.go.jp
	General Affairs Division, Japan Patent Office, Ministry of Economy, Trade and Industry	TEL: +81-3-3581-1101 http://www.jpo.go.jp

II. Labeling

1. Labeling under Legal Regulations

Quality labeling of seafood and processed products must be in Japanese and conform to the following laws and regulations: 1) Act for Standardization and Proper Labeling of Agricultural and Forestry Products, 2) Food Sanitation Act, 3) Measurement Act, 4) Health Promotion Act, 5) Act on the Promotion of Effective Utilization of Resources, 6) Act against Unjustifiable Premiums and Misleading Representations, and 7) intellectual asset-related laws (e.g., Unfair Competition Prevention Act, Trademark Act).

When importing and selling seafood as fresh product, the importer must provide the following information on labels in accordance with the quality labeling standards for fresh foods of the Act for Standardization and Proper Labeling of Agricultural and Forestry Products: 1) product name, 2) country of origin, 3) content, and 4) name and address of importer.

When importing and selling processed seafood products, the importer must provide the following information on labels in accordance with the quality labeling standards for processed foods of the Act for Standardization and Proper Labeling of Agricultural and Forestry Products, and the similar requirements for processed foods packed in containers under the Food Sanitation Act: 1) product name, 2) ingredients, 3) content, 4) expiration date, 5) storage method, 6) country of origin, and 7) name and address of importer.

<Product name>

The name of the product must be provided on the label in accordance with the Act for Standardization and Proper Labeling of Agricultural and Forestry Products and Food Sanitation Act.

<Ingredients>

The ingredients of the product must be listed in descending order from highest to lowest content on the label in accordance with the Act for Standardization and Proper Labeling of Agricultural and Forestry Products and Food Sanitation Act.

<Additives>

The substance name of additives used must be listed in decreasing order from highest to lowest content on the label in accordance with the Food Sanitation Act. The substance name and use of the following eight additives must be indicated on the label: sweeteners, antioxidants, artificial colors, color formers, preservatives, whiteners, thickeners/stabilizers/gelators/bodying agents, antifungal agents, and antimold agents). For details on usage and storage standards of additives, Notification No. 370 of the Ministry of Health, Labour and Welfare "Standards and Criteria for Food and Additives" prescribes the maximum allowable limit of approved additives for each food article

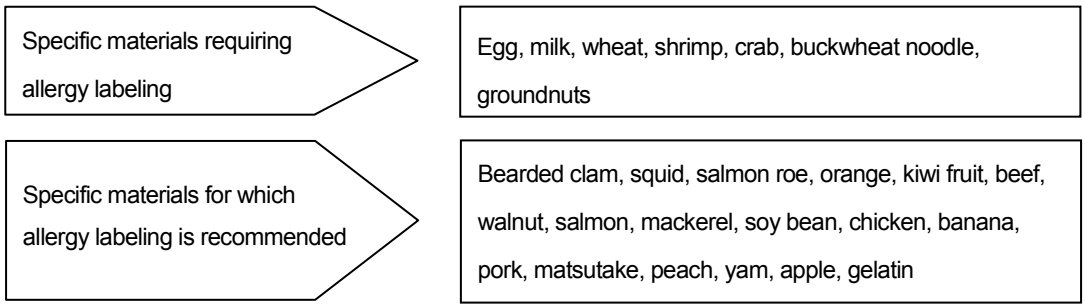
The codes and standards in accordance with the Food Sanitation Act (MHLW Notification No. 370) also require that sodium nitrite concentrations in especially salmon roe and salted salmon roe (and salted cod roe) must be under 0.005 g/kg.

<Allergies>

To prevent health hazards in consumers with specific allergies, it is required or recommended that the specific ingredients shown in Fig. 9-7 be labeled in accordance with the Food Sanitation Act.

Ingredient labeling is mandatory for products containing shrimp or crabs and recommended for those containing salmon roe. If they are included in the list of main ingredients, no additional action should be taken. If the name of ingredients on the label cannot identify specific ingredients, labeling is required or recommended.

Fig. 9-7: Specific materials related to allergy labeling



Source: Ministry of Health, Labour and Welfare

<Content weight>

When importing and selling seafood and processed products, the importer must weigh the product in accordance with the Measurement Act and indicate the weight in grams on the label. The product must be weighed so that the difference between the actual weight of the product and the figure indicated on the label is within the prescribed range.

<Expiration date>

The expiration date of the product when stored according to the given preservation method in the unopened state must be indicated on the label in accordance with the Act for Standardization and Proper Labeling of Agricultural and Forestry Products and Food Sanitation Act. Expiration date labeling consists of expiry date and "best by" date. The former applies to foods whose quality deteriorates rapidly within five days inclusive of the date of manufacture, while the latter applies to foods whose quality does not deteriorate easily in comparison.

<Preservation method>

The preservation method for maintaining flavor in the unopened state until the "best by" date must be indicated on the label in accordance with the Act for Standardization and Proper Labeling of Agricultural and Forestry Products and Food Sanitation Act. Foods requiring the labeling of the expiry date should be marked "Preserve under 10°C" while those requiring "best by" date labeling should be marked "Keep out of direct sunlight at room temperature," etc. However, the preservation method can be omitted from the label for foods that can be stored at room temperature.

<Country of origin>

The quality labeling standards for processed foods, specified by the Act for Standardization and Proper Labeling of Agricultural and Forestry Products, require the country of origin (name of water area can also be provided) to be indicated on the labels of import foods.

This Act also requires the country of origin to be labeled for the seafood and processed products listed in Fig. 9-8. All other processed foods do not require labeling.

Such information must be labeled either by stating in brackets on the list of ingredients or by stating the name of country of origin in a specified column of the labeling.

Fig. 9-8: Seafood and processed products requiring country of origin labeling

Labeling standards	Processed products subject to labeling standards	Examples
Quality labeling standards for processed foods	Salted fish, seaweed	Salted herring roe, salted wakame seaweed
	Prepared fish, seaweed (excluding those cooked or prepared and frozen products)	Tuna in soy sauce, mozuku seaweed in vinegar
	Boiled or steamed fish, seaweed	Boiled octopus
	Fish the external surface of which is roasted	Lightly roasted bonito
	Mixture of fresh agricultural, livestock, and fishery products	*Nabe* set (set of fishery products and vegetables for *nabe*)

Source: Ministry of Agriculture, Forestry and Fisheries

<Quality>

The Act for Standardization and Proper Labeling of Agricultural and Forestry Products requires labeling in the following cases.

- "Defrosted" for frozen products that have been defrosted.
- "Farmed" for farmed seafood.

<Importers>

The name and address of the importer must be indicated on the label in accordance with the Act for Standardization and Proper Labeling of Agricultural and Forestry Products, and the Food Sanitation Act. For products processed in Japan using imported ingredients, the name and address of the manufacturer or dealer must be indicated on the label.

<Nutrition facts>

The nutritional components and calorie count must be indicated on the labels of seafood and processed products in accordance with the nutritional labeling standards prescribed by the Health Minister. The required information includes nutritional components, structural components (e.g., amino acids in protein), and types of components (e.g., fatty acids in fat). If general names such as "vitamin" are labeled instead of describing the specific names of nutrients, ingredients must be labeled.

Components must be indicated in the following order and unit:

a) Calories (kcal or kilocalories)
b) Protein (g or grams)
c) Fat (g or grams)

d) Carbohydrate (g or grams)
e) Sodium
f) Other nutritional components to be indicated on labels

The Health Ministry also prescribes standards on the labeling of other nutritional components and on information to be highlighted.

Labels for specified health foods or those for special dietary uses must follow the respective standards and be screened for approval

<Containers and packaging>

The Act on the Promotion of Effective Utilization of Resources requires labeling for promoting sorted collection on specified containers and packaging. Import products which meet the following conditions are required labeling for identification by law.

- When administrative instructions have been given on the materials and structure of containers and packaging and the use of trademark for the imported product.
- When the containers and packaging of the import product is printed, labeled, or engraved with Japanese.

When the following two types of containers and packaging are used for cereals, either or both marks (Fig. 9-9) must be labeled on one area or more of the containers and packaging in the designated format.

Fig. 9-9: Labels for promoting sorted collection

Plastic containers and packaging

Paper containers and packaging

<Description>

Product descriptions with false or misleading expressions are prohibited by the Health Promotion Act, Act against Unjustifiable Premiums and Misleading Representations, and intellectual property-related laws and regulations (e.g., Unfair Competition Prevention Act, Trademark Act), which is applicable to all articles in addition to food products.

2. Labeling under Industry Voluntary Restraint

The National Karashi Mentaiko Fair Trade Conference grants Fair Trade Mark labeling to the products of members certified as following appropriate packaging and labeling requirements in accordance with the Fair Competition Code for Karashi Mentaiko Food Labeling.

Fig. 9-10: Fair Trade Mark granted by the National Karashi Mentaiko Fair Trade Conference

Fair Competition Code for Karashi Mentaiko Food Labeling

http://www.jfftc.org/cgi-bin/data/bunsyo/A-8.pdf

Contact

National Karashi Mentaiko Fair Trade Conference

TEL: +81-92-403-0191 http://www.mentaiko-ftc.org/index.html

<National Canned Food Fair Trade Conference>

The National Canned Food Fair Trade Conference grants Fair Trade Mark labeling to the products of members certified as following appropriate packaging and labeling requirements in accordance with the Fair Competition Code for Canned Food Labeling, as well as prescribes violation standards to prevent illegal labeling acts, etc.
http://www.jfftc.org/cgi-bin/data/bunsyo/A-11.pdf
Contact: National Canned Food Fair Trade Conference TEL: +81-3-3213-4751 (in Japanese Canners Association)

III. Taxation System

1. Tariff duties, consumption tax, and other relevant taxes

Tariff duties on seafood and processed products are shown as below. In order to apply for preferential tariff rates on articles imported from preferential treatment countries, the importer should submit a Generalized System of Preferences (GSP) Certificate of Origin issued by the customs or other issuing agency in the exporting country, to Japan Customs before import clearance (not required if the total taxable value of the article is no greater than ¥200,000). Details may be checked with the Customs and Tariff Bureau of the Ministry of Finance.

If the importer wishes to check the tariff classifications or tariff rates in advance, it may be convenient to use the prior instruction system in which one can make inquiries and receive replies in person, in writing, or via e-mail.

Fig. 9-11: Tariff duties on seafood and processed products (FY2011)
[Tunas]

H.S. code			Description	Tariff rate				
				General	Temporary	WTO	GSP	LDC
03.02			Tunas (of the genus Thunnus), fresh or chilled					
	31	-000	Albacore or longfinned tunas (Thunnus alalunga)	5.0%		3.5%		Free
	32	-000	Yellowfin tunas (Thunnus albacares)	5.0%		3.5%		Free
	33	-000	Skipjack or stripe-bellied bonito	5.0%		3.5%		Free
	34	-000	Bigeye tunas (Thunnus obesus)	5.0%		3.5%		Free
	35	-000	Bluefin tunas (Thunnus thynnus)	5.0%		3.5%		Free
	36	-000	Southern bluefin tunas (Thunnus maccoyii)	5.0%		3.5%		Free
	39	-000	Other	5.0%		3.5%		Free
03.03			Tunas (of the genus Thunnus), frozen					
	41	-000	Albacore or longfinned tunas (Thunnus alalunga)	5.0%		3.5%		Free
	42	-000	Yellowfin tunas (Thunnus albacares)	5.0%		3.5%		Free
	43	-000	Skipjack or stripe-bellied bonito	5.0%		3.5%		Free
	44	-000	Bigeye tunas (Thunnus obesus)	5.0%		3.5%		Free
	45	-000	Bluefin tunas (Thunnus thynnus)	5.0%		3.5%		Free
	46	-000	Southern bluefin tunas (Thunnus maccoyii)	5.0%		3.5%		Free
	49	-000	Other	5.0%		3.5%		Free
03.04			Tunas (of the genus Thunnus), fillets and other fish meat , fresh or chilled					
	19		1. Fillets					
		-191	1) Bluefin tunas (Thunnus thynnus)					
		-192	2) Southern bluefin tunas (Thunnus maccoyii)					
		-199	3) Other					
			2. Other fish meat					
		-991	1) Bluefin tunas (Thunnus thynnus)			3.5%		
		-992	2) Southern bluefin tunas (Thunnus maccoyii)					
		-999	3) Other					
	29	-910	Frozen fillets					
		-920	Tunas, excluding bluefin tunas and southern bluefin tunas					
			Bluefin tunas					
	99		Other fish meat			3.5%		
		-991	Bluefin tunas					
		-994	Southern bluefin tunas					
		-999	Other					

Source: Ministry of Finance

Fig. 9-11: Tariff duties on seafood and processed products (FY2011)
[Shrimps and crabs]

H.S. code			Description	Tariff rate				
				General	Temporary	WTO	GSP	LDC
03.06			Crustaceans					
			Frozen					
	11	-000	Rock lobster and other sea crawfish (Palinurus spp., Panulirus spp., Jasus spp.)	4.0%		1.0%		Free
	12	-000	Lobsters (Homarus spp.)	4.0%		1.0%		Free
	13	-000	Shrimps and prawns	4.0%		1.0%		Free
	14		Crabs	6.0%		4.0%		Free
		-010	- King crabs (Paralithodes spp.)					
		-020	- Snow crabs (Chionoecetes spp.)					
		-030	- Swimming crabs (Portunus spp.)					
		-040	- Horsehair crabs					
		-090	- Other					
	19		Other					
		-010	- Ebi	4.0%		2.0%		Free
		-090	- Other	10.0%		7.0%		Free
			Not frozen					
	21		Rock lobster and other sea crawfish (Palinurus spp., Panulirus spp., Jasus spp.)					
		-100	1. Live, fresh or chilled	4.0%		1.0%		Free
		-200	2. Other	6.0%		5.0%	4.0%	Free
	22		Lobsters (Homarus spp.)					
		-100	1. Live, fresh or chilled	4.0%		1.0%		Free
		-200	2. Other	6.0%		5.0%	4.0%	Free
	23		Shrimps and prawns					
			1. Live, fresh or chilled	4.0%		1.0%		Free
			- Live					
		-111	- For farming or stocking					
		-119	- Other					
		-190	- Other					
		-200	2. Other	6.0%		5.0%	4.0%	Free
	24		Crabs					
			1. Live, fresh or chilled	6.0%		4.0%		Free
			- King crabs (Paralithodes spp.)					
		-110	- Snow crabs (Chionoecetes spp.)					
			- Red snow crabs					
		-121	- Other					
		-129	- Swimming crabs (Portunus spp.)					
		-130	- Horsehair crabs					
		-140	- Mitten crabs (Eriocheir spp.)					
		-150	- Other					
		-190	2. Other	15.0%		10.0%		Free
		-200	Other					
	29		1. Live, fresh or chilled					
		-110	- Ebi	4.0%		2.0%		Free
		-190	- Other	10.0%		7.0%		Free
			2. Other					
		-210	- Ebi	6.0%		5.0%	4.0%	Free
		-290	- Other	15.0%		10.0%		Free

Source: Ministry of Finance

Fig. 9-11: Tariff duties on seafood and processed products (FY2011)
[Fish roes]

H.S. code			Description	Tariff rate				
				General	Temporary	WTO	GSP	LDC
03.02	70		Fish livers and roes, Fresh or chilled					
			1. Hard roes of Nishin or Tara	10.0%				
		-010	- Hard roes of Nishin			5.6%		Free
		-020	- Hard roes of Tara					
		-090	2. Other	5.0%		3.5%		Free
03.03	80		Livers and roes					
		-010	1. Hard roes of Nishin (Clupea spp.)	6.0%		4.0%		Free
		-020	2. Hard roes of Tara	(10.0%)	4.2%	(6.0%)		
		-090	3. Other	5.0%		3.5%		Free
03.05	20	-010	1. Hard roes of Nishin	12.0%		8.4%		Free
		-030	2. Hard roes of Salmonidae	5.0%		3.5%		Free
			3. Hard roes of Tara and Nishin roes on the tangles	15.0%				
		-020	- Hard roes of Tara			7.5%		
		-040	- Nishin roes on the tangles			10.0%		Free
		-090	4. Other	4.0%		2.8%	Free	
16.04	20		Other prepared or preserved fish					
			1. Hard roes					
			1) Of Nishin (Clupea spp.) and Tara (Gadus spp., Theragra spp. and Merluccius spp.)	12.8%				Free
			- Of Nishin (Clupea spp.)			11.0%		
		-011	- In airtight containers				9.6%	
		-012	- Other					
		-015	- Of Tara (Gadus spp., Theragra spp. and Merluccius spp.)			9.0%		
		-019	2) Other	6.4%		(6.4%)		Free
		-020	2. Other	9.6%		(9.6%)	7.2%	Free
	30		Caviar and caviar substitutes	6.4%		(6.4%)	4.8%	Free
		-010	- Ikura					
		-090	- Other					

Source: Ministry of Finance

Fig. 9-11: Tariff duties on seafood and processed products (FY2011)
[Other processed seafood products]

H.S. code			Description	Tariff rate				
				General	Temporary	WTO	GSP	LDC
03.05	59		Dried fish, whether or not salted but not smoked					
			1. Salmonidae	12.0%		8.4%		Free
		-010	2. Other	15.0%				
		-020	- Nishin (Clupea spp.), Tara (Gadus spp., Theragra spp. and Merluccius spp.), Buri (Seriola spp.), Saba (Scomber spp.), Iwashi (Etrumeus spp., Sardinops spp. and Engraulis spp.), Aji (Trachurus spp. and Decapterus spp.) and Samma (Cololabis spp.)					
		-090	- Other			10.5%		Free
03.07			Molluscs					
			Octopus (Octopus spp.)					
	51	-000	Live, fresh or chilled	10.0%		7.0%	5.0%	Free
	59		Other					
		-100	- Frozen	10.0%		7.0%	5.0%	Free
		-200	- Other	15.0%		10.0%		Free

Source: Ministry of Finance

Note 1) Special emergency tariffs may be imposed on articles if their import volume has increased by more than a specified percentage or their import price has decreased by more than a specified percentage.

Note 2) Special preferential rate is applicable only for the Least Developed Countries.

Note 3) Normally the order of precedence for application of tariff rates is Preferential, WTO, Temporary, and General, in that order. However, Preferential rates are only eligible when conditions stipulated by law or regulations are met. WTO rates apply when those rates are lower than Temporary or General rates. Refer to "Customs Tariff Schedules of Japan" (by Customs and Tariff Bureau, Ministry of Finance) for a more complete interpretation of the tariff table.

2. Consumption Tax

(CIF + Tariff duties) × 5%

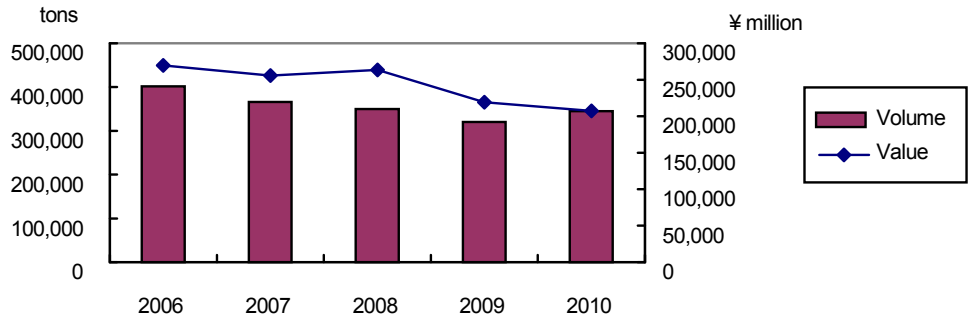
IV. Trade Trends

1. Changes in Imports

(1) Tunas

Japan is the world's largest market for tuna used for sashimi (thinly-sliced fresh raw fillet of fish), its supplies coming from oceans all over the world to meet the demands of the Japanese consumer. As the amount of tuna consumption in Japan grew, the import volume also continued to rise. However, between 2006 and 2009, imports of tuna hit a downward slope. But the growing amount of frozen tuna imports put a brake on this declining trend, and the total amount of imported tuna recovered to 345,002 tons (107.7% vs. previous year) in 2010. Seen by category, frozen yellowfin tuna used to constitute a large proportion of the imported tuna market; however, given the recent decrease of its imports, it has been replaced by imports of bigeye tuna. As a whole, the importing of fresh or chilled whole tuna has been decreasing with the exception of 2009, dropping to 34,018 tons in 2010 (84.3% vs. previous year).

Fig. 9-15: Changes in tuna imports



Source: Trade Statistics (MOF)

Fig. 9-16: Changes in tuna imports by item Units: volume = tons, value = ¥ million

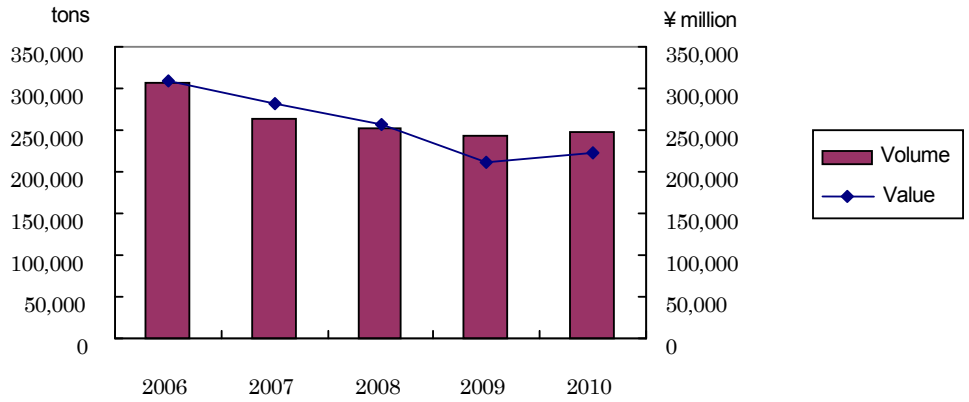
Item	Volume					Value				
	2006	2007	2008	2009	2010	2006	2007	2008	2009	2010
Tunas (of the genus Thunnus), fresh or chilled	44,474	38,067	36,497	40,369	34,018	49,807	43,297	38,200	40,058	32,709
Albacore or longfinned tunas (Thunnus alalunga)	324	278	292	275	252	214	195	226	180	181
Yellowfin tunas (Thunnus albacares)	19,078	16,929	15,628	15,603	16,116	16,219	15,126	13,469	12,597	12,380
Bigeye tunas (Thunnus obesus)	15,876	14,565	15,068	15,287	11,578	14,323	13,805	13,674	12,904	9,773
Bluefin tunas (Thunnus thynnus)	7,396	5,108	4,351	5,825	4,021	15,226	11,462	8,215	9,869	6,853
Southern bluefin tunas (Thunnus maccoyii)	1,801	1,186	1,158	3,378	2,051	3,824	2,708	2,615	4,509	3,522
Tunas (of the genus Thunnus), frozen	195,993	166,147	144,733	140,492	155,698	118,432	111,952	103,290	84,781	90,839
Albacore or longfinned tunas (Thunnus alalunga)	6,242	5,981	7,994	8,487	23,207	2,249	2,060	2,844	2,429	6,497
Yellowfin tunas (Thunnus albacares)	90,266	58,695	47,359	44,064	50,073	30,424	21,336	17,481	12,940	15,610
Bigeye tunas (Thunnus obesus)	86,276	86,831	77,846	77,060	73,859	61,031	57,569	57,587	52,502	56,033
Bluefin tunas (Thunnus thynnus)	5,355	6,283	4,178	3,991	1,765	11,152	14,533	12,124	9,135	2,572
Southern bluefin tunas (Thunnus maccoyii)	7,853	8,357	7,357	6,891	6,794	13,576	16,454	13,254	7,776	10,128
Tunas (of the genus Thunnus), fillets and other fish meat	161,037	161,976	168,316	139,520	155,286	101,623	100,330	121,839	94,418	83,676
Fillets (fresh or chilled)	2,207	2,402	2,327	2,628	3,664	2,975	2,827	2,798	2,820	3,947
Fillets (frozen)	32,945	31,840	30,982	29,724	28,615	55,936	56,950	67,646	55,729	40,892
Other fish meat (fresh or chilled)	2,910	2,529	2,309	2,081	2,125	3,242	2,785	2,497	2,058	1,909
Other fish meat (frozen)	122,974	125,205	132,698	105,087	120,882	39,471	37,767	48,898	33,810	36,928
Total	401,503	366,189	349,545	320,381	345,002	269,862	255,578	263,329	219,257	207,224

Source: Trade Statistics (MOF)

(2) Shrimps and Crabs

The shrimp category has a steady demand especially among the food service and restaurant industries in Japan. They are imported in various forms including, live, fresh, chilled, frozen, salted & dried and processed. Within this category, shrimps and prawns constitute the largest percentage, capturing 97.7% of the imports. On the other hand, the importing of crabs has remained stagnant hovering around the 100,000-ton-zone since 2001, which dropped further to the 40,000-ton-zone in 2007 and finally dropping to a low of 36,462 tons (90.1% vs. previous year) in 2010. This major drop is attributed to the following negative factors: the continued suspension of imports since 2007 from North Korea; the drastic decline in imports from China; as well as the drop in imports from Russia in the increased efforts to combat poaching by Russian fishing vessels.

Fig. 9-17: Changes in shrimp and crab imports



Source: Trade Statistics (MOF)

Fig. 9-18: Changes in shrimp and crab imports by item Units: volume = tons, value = ¥ million

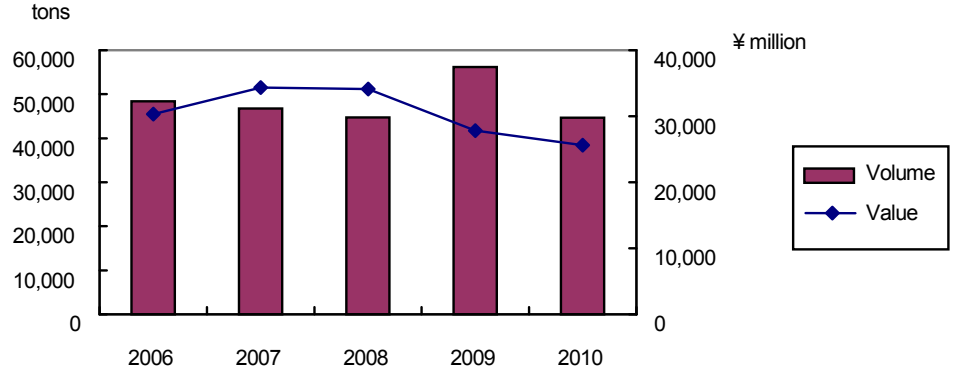
Item	Volume					Value				
	2006	2007	2008	2009	2010	2006	2007	2008	2009	2010
Shrimps	238,020	214,575	202,305	202,518	210,303	248,013	225,928	197,513	172,007	181,057
Rock lobster	4,971	4,543	3,288	2,840	2,633	13,450	13,726	9,954	5,873	6,604
Lobsters (Homarus spp.)	2,149	1,988	1,662	1,377	1,690	5,129	5,728	4,063	2,608	3,168
Shrimps and prawns	230,140	207,410	196,763	197,618	205,487	227,884	205,183	182,280	162,570	170,410
Other	760	633	592	683	492	1,551	1,292	1,216	956	875
Crabs	69,567	48,439	49,098	40,459	36,462	61,484	54,974	59,735	39,319	41,274
King crabs (Paralithodes spp.)	33,264	21,960	19,746	16,283	11,487	31,746	26,890	30,783	18,989	18,645
Red snow crabs	26,402	20,375	21,729	18,678	19,266	24,240	24,270	24,882	17,241	19,294
Swimming crabs (Portunus spp.)	5,403	3,226	4,414	3,337	2,894	2,436	1,638	2,081	1,532	1,262
Horsehair crabs	3,975	2,611	2,532	1,770	2,225	2,726	1,954	1,642	1,303	1,826
Other	523	266	677	391	590	336	223	348	254	246
Total	307,587	263,014	251,403	242,977	246,765	309,497	280,902	257,249	211,326	222,330

Source: Trade Statistics (MOF)

(3) Octopus

Most octopus are imported frozen, and very little is imported live, fresh, chilled or processed. The general trend on octopus imports has remained the same. However, given the craze for Japanese food overseas as well as a fishing moratorium issued by many countries that has put pressure on global food supply, imports have decreased drastically, halving the import volume from over 100,000 tons in 2000 to below 50,000 tons. The import of frozen octopus saw a steep rise in 2009 reaching 56,196 tons (125.7% vs. previous year). However, this increase is purported to be a reaction to the price hike in 2008, and the total import on a value basis has actually decreased to ¥ 27,822 million (81.5% vs. previous year).

Fig. 9-19: Changes in octopus imports



Source: Trade Statistics (MOF)

Fig. 9-20: Changes in octopus imports by item Units: volume =1000 tons, value = ¥ million

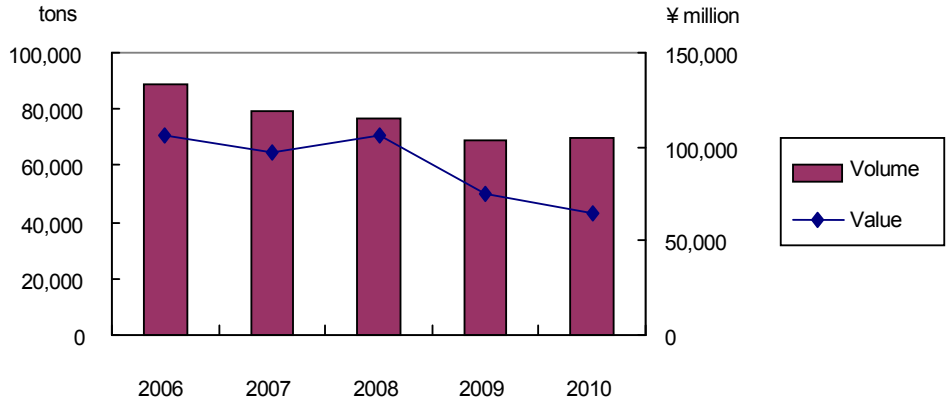
Item	Volume					Value				
	2006	2007	2008	2009	2010	2006	2007	2008	2009	2010
Octopus (live, fresh or chilled)	12	7	4	3	4	15	11	5	4	3
Octopus (frozen)	48,360	46,784	44,707	56,192	44,677	30,313	34,352	34,119	27,818	25,602
Octopus (prepared)	1	0	1	*	1	2	0	1	1	2
Total	48,373	46,791	44,712	56,196	44,682	30,329	34,363	34,124	27,822	25,607

Source: Trade Statistics (MOF)
Note) "*" represents that the figure is less than 1,000 tons.

(4) Fish roes

Various kinds of fish roe are imported to Japan. They are centered around the hard roe of cod, as well as herring, salmon, and trout in order to meet the demands of the Japanese consumer. However, the import volume has been decreasing which includes the main item cod roe, with the total amount of imports falling below 70,000 tons, a mark of 68,605 tons (89.4% vs. previous year) in 2009. In 2010, imports temporarily recovered to 70,199 tons (102.3% vs. previous year) due to the decline in the per-unit price. Although imports slightly increased compared to the year before on a volume basis, the import value decreased to ¥ 64,219 million (85.0% compared to the previous year).

Fig. 9-21: Changes in fish roe imports



Source: Trade Statistics (MOF)

Fig. 9-22: Changes in fish roe import by item Units: volume = tons, value = ¥ million

Item	Volume					Value				
	2006	2007	2008	2009	2010	2006	2007	2008	2009	2010
Hard roes of Cod (Gadus spp., Theragra spp. and Merluccius spp.)	58,008	50,933	52,042	42,246	47,285	72,145	60,040	68,362	42,566	40,189
Frozen	44,291	38,585	42,218	34,215	38,806	49,408	41,602	53,361	31,104	28,918
Salted or in brine	1,962	2,351	2,290	1,275	1,571	3,027	3,506	3,540	1,786	2,016
Prepared	11,755	9,997	7,534	6,755	6,908	19,709	14,932	11,461	9,676	9,255
Hard roes of Nishin (Clupea spp.)	11,116	8,847	8,208	9,302	9,389	10,135	11,035	10,965	11,925	9,863
Frozen	3,482	2,835	2,474	3,176	2,733	1,700	2,009	1,923	2,694	2,299
Salted or in brine	7,331	5,783	5,586	5,873	6,438	8,118	8,726	8,870	8,956	7,305
Prepared	304	229	147	253	218	316	300	172	274	258
Other fish roes	19,646	19,446	16,456	17,058	13,525	24,062	26,020	26,220	21,086	14,167
Fresh / chilled	2,700	2,267	2,034	1,703	1,918	2,289	1,788	1,550	1,158	1,163
Frozen	7,086	8,755	8,488	8,158	5,501	5,626	8,095	11,397	8,052	3,776
Salted or in brine	684	878	730	718	755	1,513	1,956	1,095	739	922
Prepared	621	341	244	300	277	485	351	224	275	334
Nishin roes on the tangles	528	470	543	552	496	918	1,591	1,392	731	453
Hard roes of salmons / Trout (Salmo trutta, Oncorhynchus mykiss, Oncorhynchus clarki, Oncorhynchus aguabonita, Oncorhynchus gilae, Oncorhynchus apache and Oncorhynchus chrysogaster)	3,560	3,119	2,111	3,248	2,896	4,915	4,686	4,022	4,979	4,069
Ikura (Prepared)	3,158	2,145	1,424	1,148	857	6,020	4,850	4,929	2,989	1,635
Caviar and caviar substitutes	1,309	1,471	881	1,230	823	2,296	2,703	1,612	2,162	1,815
Total	88,770	79,226	76,706	68,605	70,199	106,341	97,094	105,547	75,576	64,219

Source: Trade Statistics (MOF)

2. Regional breakdown

(1) Tunas

Japan's largest trading partner of tuna is Taiwan, with 61,947 tons (119.2% vs. previous year) in 2010. Ranking second is China, who was behind South Korea and Thailand in 2004, which saw a drastic increase in recent years reaching 52,287 tons (95.7% compared to the precious year) in 2010. In 2008, China outweighed Taiwan with 61,680 tons. This is partly attributable to the country's growing efforts to increase the catch of tuna given its rising domestic demand. And this can be observed in its opposition against restrictions of tuna fishing at international conferences.

Fig. 9-23: Trends in leading partner imports: tunas

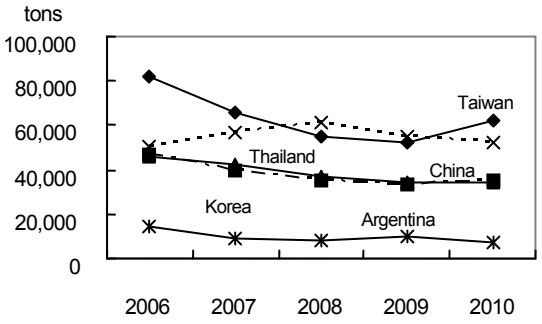
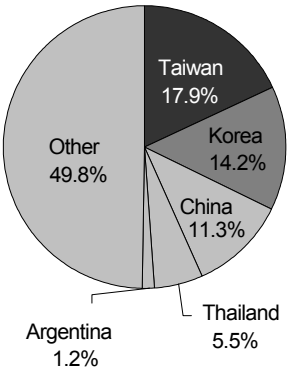


Fig. 9-24: Shares of imports in 2010 (value basis): tunas



Source: Trade Statistics (MOF)

Fig. 9-25: Principal places of origin: tunas

Units: volume = tons, value = ¥ million

Country	Volume					Value				
	2006	2007	2008	2009	2010	2006	2007	2008	2009	2010
Taiwan	82,249	66,177	55,158	51,957	61,947	48,694	39,405	36,853	31,076	37,193
China	50,338	56,748	61,680	54,643	52,287	26,263	25,372	27,008	24,393	23,350
Korea	46,598	39,920	35,041	33,257	35,325	29,314	29,848	29,849	26,752	29,517
Thailand	45,771	42,355	36,516	34,195	34,636	12,463	11,933	14,708	10,218	11,455
Argentina	14,057	9,194	8,275	10,299	7,252	3,926	2,635	4,068	3,924	2,560
Other	162,489	151,795	152,875	136,030	153,555	149,203	146,385	150,843	122,894	103,150
Total	401,503	366,189	349,545	320,381	345,002	269,862	255,578	263,329	219,257	207,224
(African countries)	6,927	9,114	7,936	8,043	7,136	4,991	12,492	13,881	12,893	7,458

Source: Trade Statistics (MOF)

Fig. 9-26: Principal places of origin of tunas by item Units: volume = tons, value = ¥ million

Item		Total vol. imports	First place					Second place				
			Country	Volume	Share	Value	Ave. unit price	Country	Volume	Share	Value	Ave. unit price
Fresh	Albacore or longfinned tunas (Thunnus alalunga)	252	New Caledonia	109	43.0%	86	789.7	Fiji	71	28.1%	48	674.9
Fresh	Yellowfin tunas (Thunnus albacares)	16,116	Indonesia	7,734	48.0%	5,874	759.5	Thailand	2,809	17.4%	2,110	751.1
Fresh	Bigeye tunas (Thunnus obesus)	11,578	Indonesia	8,099	70.0%	6,262	773.1	Vietnam	786	6.8%	764	971.7
Fresh	Bluefin tunas (Thunnus thynnus)	4,021	Korea	1,045	26.0%	564	540.0	Mexico	948	23.6%	1,381	1457.4
Fresh	Southern bluefin tunas (Thunnus maccoyii)	2,051	Australia	1,638	79.9%	2,879	1757.3	New Zealand	249	12.2%	488	1956.8
Frozen	Albacore or longfinned tunas (Thunnus alalunga)	23,207	Taiwan	9,027	38.9%	2,377	263.4	Vanuatu	5,552	23.9%	1,476	265.9
Frozen	Yellowfin tunas (Thunnus albacares)	50,073	Taiwan	14,721	29.4%	5,834	396.3	Korea	7,939	15.9%	2,726	343.4
Frozen	Bigeye tunas (Thunnus obesus)	73,859	Taiwan	34,735	47.0%	26,204	754.4	China	18,094	24.5%	13,691	756.7
Frozen	Bluefin tunas (Thunnus thynnus)	1,765	Croatia	761	43.1%	1,294	1699.3	Mexico	579	32.8%	434	749.1
Frozen	Southern bluefin tunas (Thunnus maccoyii)	6,794	Australia	4,879	71.8%	7,810	1600.6	Taiwan	984	14.5%	878	892.5
Fresh fillet	Bluefin tunas (Thunnus thynnus)	2	Malta	2	76.5%	4	2079.3	Norway	※	※	※	※
Fresh fillet	Other	3,662	Norway	2,415	66.0%	2,488	1030.3	Indonesia	707	19.3%	697	985.9
Frozen fillet	Tunas	20,002	Korea	10,970	54.8%	14,257	1299.6	Fiji	3,943	19.7%	2,907	737.2
Frozen fillet	Bluefin tunas (Thunnus thynnus)	8,599	Malta	2,487	28.9%	5,383	2164.4	Croatia	1,112	12.9%	2,087	1877.6
Frozen fillet	Southern bluefin tunas (Thunnus maccoyii)	14	Indonesia	7	50.6%	8	1102.1	Australia	6	45.9%	16	2500.3
Fish meat	Bluefin tunas (Thunnus thynnus)	77	Malta	38	49.0%	79	2097.8	Turkey	12	15.3%	26	2231.0
Fish meat	Other	122,930	Thailand	31,297	25.5%	8,970	286.6	China	29,031	23.6%	6,282	216.4

Source: Trade Statistics (MOF)

Note 1) The share is calculated on a kg basis in the original data source and is not always in agreement with the percentage in the above table, which is calculated on a tonnage basis.

Note 2) "※" represents that the volume of import is less than 1,000 tons.

(2) Shrimps

Japan's trading partners in the category of shrimp have moved their farming centers a number of times due to contamination and the spread of diseases in their aquaculture ponds. Recently, Vietnam has been a largest trading partner in this category with the import volume reaching 40,459 tons (101.4% vs. previous year) in 2010.

Thailand, who was our biggest trading partner until the early 1990's, has been back on the upward trend in terms of shrimp exports to Japan, reaching 37,655 tons (117.4% vs. previous year) in 2010, edging closer to Vietnam.

Fig. 9-27 : Trends in leading partner imports

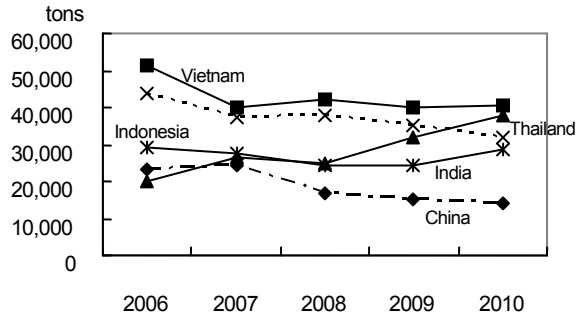
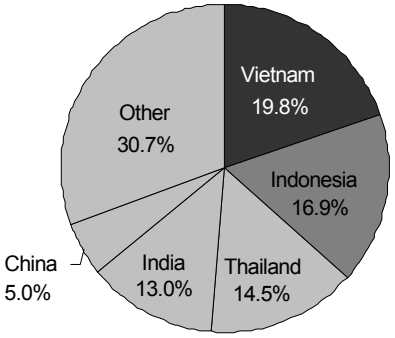


Fig. 9-28 : Shares of imports in 2010 (value basis)



Source: Trade Statistics (MOF)

Fig. 9-29: Principal places of origin: shrimps

Units: volume = tons, value = ¥ million

Country	Volume					Value				
	2006	2007	2008	2009	2010	2006	2007	2008	2009	2010
Vietnam	51,149	40,044	42,176	39,891	40,459	52,152	42,400	38,532	33,865	35,814
Thailand	20,097	26,380	24,957	32,084	37,655	18,204	22,361	20,288	22,541	26,340
Indonesia	43,830	37,545	37,618	34,961	32,129	46,328	41,792	36,948	30,955	30,649
India	29,181	27,404	24,159	24,565	28,617	27,214	26,176	20,638	18,437	23,609
China	23,018	24,130	16,892	15,192	13,947	18,971	17,760	12,713	10,045	9,138
Other	70,746	59,072	56,502	55,825	57,496	85,144	75,440	68,394	56,164	55,506
Total	238,020	214,575	202,305	202,518	210,303	248,013	225,928	197,513	172,007	181,057
(African countries)	3,410	2,126	1,858	1,708	1,067	4,882	4,709	3,525	2,376	2,013

Source: Trade Statistics (MOF)

(3) Crabs

In the category of crab, with the exceptions of a temporary recovery in 2003 and 2004, imports from our largest trading partner, Russia, have been dwindling partly due to the tightening control over poaching, recording 21,904 tons (85.9% vs. previous year) in 2010. However, Russia still remains our largest import trading partner, constituting approximately 60% of the total import crab market. Imports from other countries have also seen sluggish growth with the total import volume down to 36,462 tons (90.1% vs. previous year).

Fig. 9-30 : Trends in leading partner imports: crabs

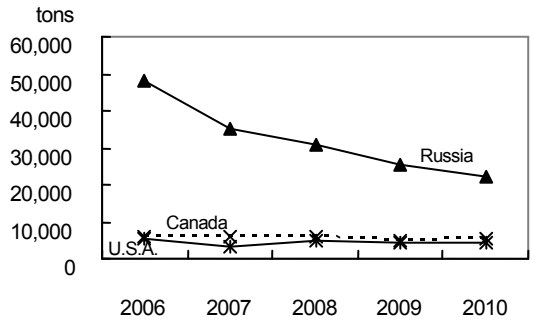
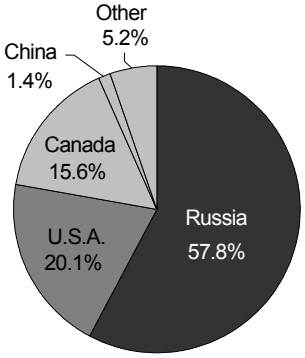


Fig. 9-31 : Shares of imports in 2010 (value basis): crabs



Source: Trade Statistics (MOF)

Fig. 9-32: Principal places of origin of crabs Units: volume = tons, value = ¥ million

Country	Volume					Value				
	2006	2007	2008	2009	2010	2006	2007	2008	2009	2010
Russia	48,039	34,947	30,873	25,504	21,904	40,350	37,603	37,579	23,371	23,850
Canada	6,213	5,985	5,841	4,852	5,327	6,738	8,312	7,734	5,133	6,442
U.S.A.	5,534	3,249	5,082	4,415	4,578	8,809	6,309	9,749	6,771	8,278
China	4,572	193	2,553	1,012	1,580	2,662	1,099	1,182	463	575
North korea	2,136	0	0	0	0	526	0	0	0	0
Other	3,073	4,066	4,748	4,675	3,073	2,399	1,651	3,490	3,582	2,128
Total	69,567	48,439	49,098	40,459	36,462	61,484	54,974	59,735	39,319	41,274
(African countries)	38	10	11	10	15	30	9	10	8	14

Source: Trade Statistics (MOF)

(4) Octopus

Mauritania is Japan's biggest trading partner of import octopus (16,224 tons, 61.2% vs. previous year), followed by Morocco (10,775 tons, 78.3% vs. previous year). While imports from these top two countries have substantially dropped compared to 2009, China, ranking third, has drastically increased its import in 2010 to 9,425 tons, a 170.3% increase compared to the previous year, supplementing the decrease in imports from other countries.

Fig. 9-33 : Trends in leading partner imports

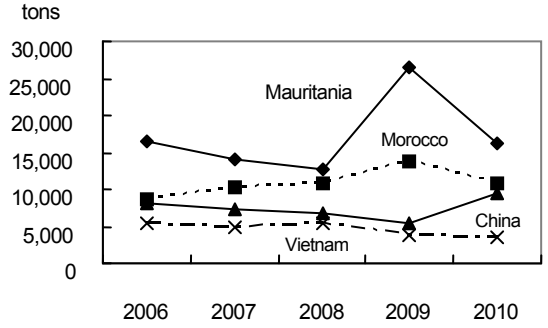
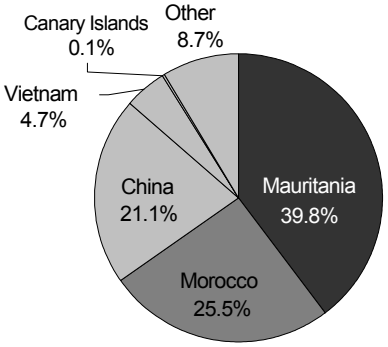


Fig. 9-34: Shares of imports in 2010 (value basis)



Source: Trade Statistics (MOF)

Fig. 9-35: Principal places of origin: octopus Units: volume = tons, value = ¥ million

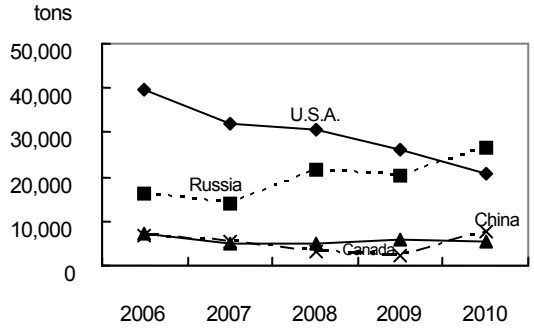
Country	Volume					Value				
	2006	2007	2008	2009	2010	2006	2007	2008	2009	2010
Mauritania	16,588	13,960	12,627	26,505	16,224	11,347	11,913	11,380	13,269	10,202
Morocco	8,688	10,311	10,876	13,767	10,775	5,968	8,348	9,330	6,866	6,528
China	8,196	7,179	6,667	5,535	9,425	5,980	5,766	5,025	3,413	5,392
Vietnam	5,510	4,800	5,485	3,742	3,416	1,865	1,755	2,196	1,448	1,216
Canary Islands	2,605	395	187	48	75	1,621	285	186	21	35
Other	6,786	10,146	8,870	6,599	4,766	3,548	6,296	6,008	2,805	2,234
Total	48,373	46,791	44,712	56,196	44,682	30,329	34,363	34,124	27,822	25,607
(African countries)	29,106	26,179	25,977	41,502	28,227	19,725	21,629	22,632	20,592	17,305

Source: Trade Statistics (MOF)

(5) Fish roes

In terms of fish roe imports, the United States remained a largest trading partner up until 2009. However, Russia outweighed the US in 2010 with 26,704 tons (132.3% vs. previous year) of import volume, ranking first in this category. Also, imports from China have increased dramatically marking a 321.9% growth from 2009.

Fig. 9-36 : Trends in leading partner imports



Source: Trade Statistics (MOF)

Fig. 9-37: Shares of imports in 2010 (value basis)

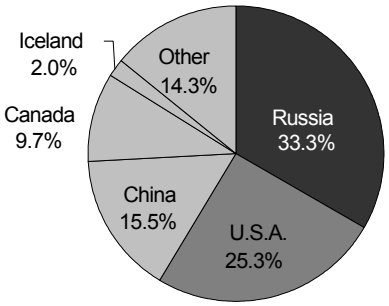


Fig. 9-38: Principal places of origin: fish roes

Units: volume = tons, value = ¥ million

Country	Volume					Value				
	2006	2007	2008	2009	2010	2006	2007	2008	2009	2010
Russia	16,369	13,751	21,592	20,190	26,704	16,391	15,567	27,793	18,724	21,354
U.S.A.	39,676	32,191	30,654	26,201	20,634	47,812	35,510	42,353	27,325	16,223
China	6,643	5,276	3,365	2,412	7,765	7,413	6,384	4,722	2,936	9,965
Canada	7,052	4,885	4,868	5,722	5,341	7,895	7,117	7,511	7,993	6,260
Iceland	2,727	4,196	3,104	1,154	2,371	1,273	2,282	1,893	731	1,265
Other	16,304	18,927	13,122	12,926	7,384	25,558	30,234	21,275	17,867	9,153
Total	88,770	79,226	76,706	68,605	70,199	106,341	97,094	105,547	75,576	64,219
(African countries)	90	80	58	33	15	38	36	28	18	7

Source: Trade Statistics (MOF)

3. Import Market Share in Japan

The domestic consumption of seafood in Japan has long been supported by a steady demand coming from strong traditional roots. However, the accelerating declines in birthrates, the graying of society, as well as the westernization of our diet, have contributed to the declining consumption of seafood. On one hand, there is a growing concern for dwindling marine resources while on the other hand demand for seafood is increasing because of the craze for Japanese food in emerging nations like China. Japan not only sees sluggish growth of seafood consumption, but also dwindling purchasing power in an increasingly competitive global seafood market.

A prime example of this is tuna. There have been some influential international conferences to discuss regulations on tuna fishing. Such a global trend is only expected to grow, thus placing Japan in a deeper predicament. Looking at imports of seafood as a whole, imports account for about half of the entire market, marking 51.6% in 2008. Though gradually, the share of imports in the Japanese market is decreasing. This is not due to the increase of domestic supply capability, but is attributable to the dwindling domestic consumption as well as to weakening competitiveness in an international market.

Fig. 9-39: Import market share in Japan

Unit: tons

	Statistics	2004	2005	2006	2007	2008
Seafood products	Domestic production	5,178	5,152	5,131	5,102	5,028
	Import volume	6,055	5,782	5,711	5,162	4,851
	Export volume	631	647	788	815	645
	Increase in inventory	83	86	162	△101	△ 170
	Domestic consumption	10,519	10,201	9,892	9,550	9,404
	Share of imports	57.6%	56.7%	57.7%	54.1%	51.6%

Source: Food balance sheet, Ministry of Agriculture, Forestry and Fisheries

4. Background of Changes in Volume of Imports and Other Trends

In Japan, processed seafood products such as ham and sausage enjoy a more stable demand than seafood itself. Manufacturers promote the sale of processed seafood products by appealing to its healthy image and actively engaging in promotional campaigns. While processed foods enjoy steady demand, the consumption of whole fish and seafood is on a decreasing trend.

However, there is another worry not only concerning fish and seafood for direct consumption, fish that are processed into products will not be available to Japanese consumers in the future. This concern comes from the growing demand for Japanese food among emerging nations such as China, as well as North America and Europe where Japanese cuisine is booming. Also, processed seafood items such as fish cake (known in Japanese as kamaboko) is gaining visibility within the global market.

V. Domestic Distribution

1. Trade Practice, Etc.

Most seafood, both domestic and imported, is generally distributed by two major routes: in the first route, fresh seafood is sold to retail shops, such as mass merchandise outlets, by wholesalers located within the area of consumption, which then reaches the consumer; in the second route, fresh seafood is sold directly to retail distributors or processed food manufacturers without going through the wholesale market. There are increasing numbers of cases where seafood is distributed to large-scale consumers such as processed food manufacturers without going through the wholesale market.

2. Domestic Market Situations

As an island nation, seafood, along with processed seafood products, has long been an integral part of the Japanese lifestyle. However, with the impact of a falling birthrate and an accelerating graying society, domestic consumption as well as imports of seafood have both seen a decreasing trend (refer to Fig. 9-39).

According to the family income and expenditure survey conducted by the Ministry of Internal Affairs and Communications, annual purchases of seafood have decreased and the proportion of seafood in the total expenditure on foods has dropped from 9.5% in 2006 to 8.6% in 2010 (refer to Fig. 9-40). The contributing factors to this decline include: advancing westernization of the diet, less amount of time to be spared for cooking, and the relatively higher price of seafood compared to meats. As for the types of seafood that consumers purchase, fresh seafood has the largest share, accounting for approximately 60 % of the total.

Fig. 9-40: Changes in annual purchased amount of seafood per household by item (2010) Unit: yen

	Seafood					Percentage of total
		Fresh	Salted, dried	Minced paste	Other processed seafood	
2006	74,652	44,493	13,901	7,267	8,991	9.5%
2007	74,645	44,284	13,915	7,384	9,062	9.5%
2008	72,752	42,201	13,804	7,845	8,903	9.3%
2009	70,272	40,751	13,093	7,700	8,728	9.0%
2010	67,055	38,645	12,564	7,370	8,476	8.6%

Source: Annual Census on Households by Ministry of Internal Affairs and Communications
* Subjects are households with two or more family members.

Fig. 9-41: Annual purchased amount of seafood per household: ranking (2010) Unit: ¥

Rank	Item	Purchased amount	Ratio	Rank	Item	Purchased amount	Ratio
1	Tuna (fresh)	4,507	6.7%	6	Pickled fish	2,486	3.7%
2	Salmon (fresh)	3,109	4.6%	7	Salted cod roes	2,429	3.6%
3	Fish minced and steamed	2,594	3.9%	8	Fish minced and steamed, fried	2,124	3.2%
4	Shrimp (fresh)	2,569	3.8%	9	Cuttlefish (fresh)	1,986	3.0%
5	Yellow tail (fresh)	2,526	3.8%	10	Canned fish	1,896	2.8%

Source: Annual Census on Households by Ministry of Internal Affairs and Communications
* Subjects are households with two or more family members.

(1) Fresh Fish and Seafood

Fresh seafood for both commercial and household use is most commonly purchased fresh and cooked at home or at the respective places of consumption. One of the reasons why consumers are shying away from eating fresh seafood is that it is time consuming to clean, prepare, and then cook. An increasing number of retailers including mass merchandise outlets are catering to such needs of the consumers by selling fillets of fish which take less time to prepare and cook.

According to the Annual Census on Households, the type of fish that is purchased the most is tuna (fresh), demonstrating the high popularity of tuna in Japan. Tuna are more often consumed as sashimi or sushi rather than cooked. The second most popular type of seafood is salmon (fresh). Not only wild salmon but also cultured salmon which are imported from Chile and Norway. Shrimp is another seafood widely enjoyed from raw consumption to processed food, and the per-household purchase of shrimp is fairly high. In Japan, shrimp is not only enjoyed for its taste and texture, but also for its red color which appears when cooked. As red is the color for good luck, shrimp is an indispensable ingredient for foods served at special events such as New Years and weddings. On special occasions, people tend to prefer larger shrimp such as lobsters and Ise-ebi (rock lobsters). Octopus can be consumed fresh, but they are usually sold boiled. At home, people enjoy octopus sashimi (it is called sashimi even it is boiled, as long as it is sliced and enjoyed with soy sauce). Octopus are also used as an ingredient for a popular snack in Japan called “tako-yaki” (pieces of octopus or tako fried in dough). “Tako-yaki” is a bite-sized snack, so tentacles or “legs” of octopus are cut in pieces of 1 to 2 centimeters, which are then used. It is also said that octopus with thin skin and less moisture are more suitable for “tako-yaki.”

Fig. 9-42: Annual purchased amount of seafood per household by item (2010)

Item	Purchased amount (¥)	Ratio
Tuna	4,507	11.7%
Salmon	3,109	8.0%
Shrimp	2,569	6.6%
Octopus	1,059	2.7%
Scallop	1,175	3.0%
Other seafood	26,226	67.9%
Total	38,645	100.0%

Source: Annual Census on Households by Ministry of Internal Affairs and Communications
* Subjects are households with two or more family members.

(2) Processed Seafood Products

Processed foods using seafood as the main ingredient include processed fish pastes, canned seafood, fish meat ham, and sausage. In all products, it is crucial to take measures against the rising price of fish due to the increase in demand as well as dwindling marine resources. Fish jelly products boast the largest sales in this category, and most of the products are made with minced white fish that is steamed, grilled, deep-fried, or prepared otherwise. Although these processed products are traditional Japanese food, the ingredient, minced white fish, is mostly imported. Many processed food manufacturers make strenuous efforts to ensure the procurement of ingredients.

For example, given the fluctuating price of minced white meat from Alaska, manufacturers started seeking supplies from South East Asia. The top runners in the processed seafood products category include, Kibun Foods, Ichimasa Kamaboko, and Sugiyo. Given the fact that processed seafood has been an integral part of the culture for a long time, it is not surprising that each local area has developed its own flavor and products, making this market unique with the participation of many small and medium-sized companies.

As for canned seafood products, canned blue-skin fish (known as "ao-sakana") such as mackerel (saba) and sardines (iwashi) and canned tuna account for more than 90 % of the market in this category. The sales of canned blue-skin fish are expanding given the blood-cholesterol-reducing properties found in DHA and EPA which are abundant in blue fish. Canned tuna, for its low-price and versatility, has gained a stable popularity in the market. However, given the recent decline in the catch and the rising price of the ingredients for canned tuna such as tuna and bonito, manufacturers have been forced to raise prices. While this is true, the tendency for consumers to demand lower-priced products is alive and well. Hence, budget-pleasing imported canned tuna as well as private label (PL) products of retail chains are sold in response to such consumer demands. Major manufacturers of canned seafood include Hagoromo Foods, Maruha Nichiro Foods, Nippon Suisan Kaisha (Nissui), and Inaba Foods.

Fish meat ham and sausage are products that have a similar form to meat sausage but are made with minced fish meat. It is cheaper than sausages made with animal meat, thus they are enjoyed as an alternative to meat sausages and ham. The demand for fish meat ham and sausages is expanding given its low price as well as the increase in these types of products that appeal to consumers with their healthy-promoting properties such as calcium and DHA contained in fish. Manufacturers in this market include not only major canned seafood manufacturers such as Nippon Suisan Kaisha and Maruha Nichiro Foods, but also processed meat manufacturers such as Marudai Food.

Bonito has long been used in Japanese cuisine in a variety of ways. One processed bonito product, called "katsuo-bushi" is bonito flakes that are cooked and dried, it is often sold in individual packages commonly known as "katsuo-pack." Companies such as Yamaki, Marutomo, and Ninben manufacture katsuo-bushi products. Although katsuo-bushi sales have been on the decline, it remains as an indispensable product in Japanese cuisine. Since no other fish can replace katsuo or bonito to make katsuo-bushi products, this market hinges on the catches and price trends of bonito.

Processed salmon products include smoked salmon and salmon flakes. Sales of smoked salmon have increased when smoked salmon made from Chilean salmon trout, which is cheaper than Norwegian one, became available in the market. This was made possible by salmon trout culturing that began in Chile in the 1990's. The top manufacturer in this category is Sanyo Foods, which makes and sells smoked salmon. The second largest manufacturer, San Francisco Trading Japan, mainly imports and sells smoked salmon produced in Chile. Smoked salmon is enjoyed in a variety of ways, including foods served at restaurants as well as in sandwiches and salads. Salmon flakes refer to products that use grilled or steamed salmon meat broken into flakes, and are often enjoyed with rice. Since this product is made to compliment Japanese food, many of these products use domestic ingredients (mainly from Hokkaido).

For frozen fried seafood products, shrimp, squid, oysters, and white fish are most commonly used. Since no other seafood can replace shrimp, squid and oyster products, they are under the strong influence of factors such as the amount of their catches and their price. The major areas of production for shrimp used for these frozen products are Thailand, Vietnam, and Indonesia. More and more regions are beginning to grow the lower-priced whiteleg shrimp (Litopenaeus vannamei). Top manufacturers in this category include the major processed seafood food manufacturers like Nippon Suisan Kaisha, Maruha Nichiro, and Kyokuyo, as well as major frozen food manufacturers like TableMark, and SK Foods. Among frozen fried seafood products, frozen white fish products use Alaskan Pollock (sukeso-tara), Pacific cod (ma-dara), and hoki or New Zealand whiptail. Because various kinds of fish can be used to make fried frozen white fish, it has a more stable supply of ingredients compared to other frozen fried seafood products using a single seafood item. This contributes to the largest sales of white fish products in the frozen fried seafood category. Salmon and scallops are also used to make frozen fried seafood products.

* Private label (PL) products are those for which a retail company or wholesaler is involved in product development and labels under its own brand. Advertising or handling by a wholesaler is not required, and items can thus be priced lower than manufacturer brands.
National brand (NB) products, meanwhile, are those that are developed and marketed by manufacturers.

Fig. 9-43: Changes in processed seafood sales of volume

Unit: tons

Item	2006	2007	2008	2009	2010 (forecast)
Processed fish pastes	554,000	525,000	504,000	480,500	474,800
Canned blue-skin fish	59,200	60,400	60,600	63,400	61,400
Canned tuna	53,500	52,300	51,500	51,400	51,300
Other canned seafood	11,400	10,400	9,800	7,700	8,200
Fish meat ham, and sausage	64,800	65,000	70,800	71,500	72,200
Dried bonito flakes	46,300	44,700	44,000	43,900	42,200
Smoked salmon	5,400	5,300	5,050	4,900	4,750
Salmon flakes	—	—	—	4,000	3,980
Frozen white fish products / frozen fried seafood products	74,100	72,600	63,500	59,200	57,400
Frozen fried shrimp	23,300	22,800	22,300	20,400	20,200
Frozen fried oyster	14,800	14,700	13,900	13,500	13,100
Frozen fried squid	9,500	9,300	8,950	7,750	7,550
Chilled fried seafood	8,900	8,800	8,200	7,500	7,200

Source: 2011 Food Marketing Handbook No. 2, 2011 Food Marketing Handbook No. 5, Fuji Keizai

3. Distribution Channels

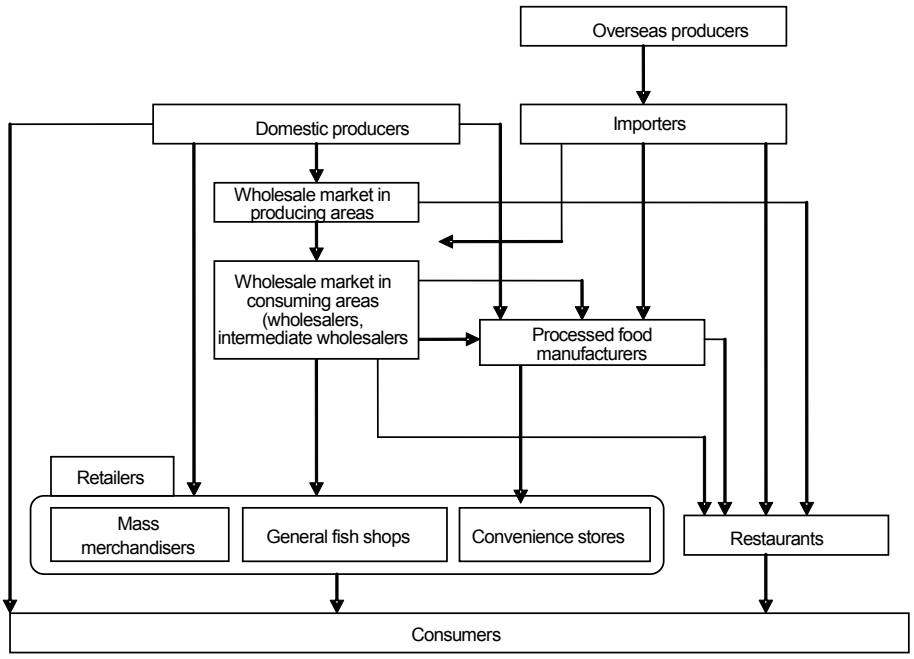
(1) Fresh fish and seafood

The distribution channel of fresh seafood used to be determined by law from the place of production to wholesalers, from wholesalers to intermediate wholesalers and then to retailers. However, given the amendment to the law that stipulated this flow in 2005, producers can now directly sell seafood to retail shops, restaurants, and individual consumers without the agency of wholesalers and intermediate wholesalers. Given this change, the percentage of seafood handled through wholesale markets in the respective areas of consumption is decreasing year-by-year, recording 60 % in 2007 according to the report on wholesale markets prepared by the Ministry of Agriculture, Forestry and Fisheries. Generally, however, since seafood varies widely in type and size, they are first sorted out by type and size at the local market where they are unloaded, then shipped to central wholesale markets such as the Tokyo metropolitan central wholesale market (also known as the Tsukiji market), Nagoya central wholesale market, and Osaka municipal central wholesale market. At the central wholesale markets, seafood gathered are auctioned off by wholesalers and intermediate wholesalers, and then shipped to retail shops and restaurants. An increasing number of large-scale customers such as food-service chains and food processing companies purchase a certain amount of seafood directly from producers and purchase the rest from the market in order to ensure a stable supply and to cut costs.

(2) Processed Seafood Products

As for imported processed seafood products, they are generally delivered to food processing manufacturers, retail shops and food-service chains, and wholesalers of commercial foodstuffs in Japan via importers such as import firms. As for frozen food, there are cases where processing and packaging are done before being imported to Japan. Recently, there have been an increasing number of cases where processed seafood products such as salted and dried products are directly delivered to consumers from producers.

Fig. 9-44: Distribution channels for seafood and processed products



Source: Fuji Keizai research data

4. Issues and Considerations for Entering the Japanese market

When importing processed seafood products to Japan, it is necessary to make sure that the products comply with the standards set by the Food Sanitation Act. Also, for cultured seafood, it is necessary to make sure that no synthetic antibiotics that are prohibited in Japan, are used and that it meets the residue standards.

Also, when making the first entry into the market, it is wise to work with import firms that have the expertise in handling seafood and processed seafood products in order to effectively conduct all the necessary paperwork for importing, as well as contacting prospective customers.

For Japanese food processing manufacturers, securing stable supplies of seafood ingredients is their major challenge, so this is the area of business with great potential for growth.

<Exhibitions>

Fig. 9-45: Exhibitions for seafoods an processed products

Overall food products	FOODEX	
	http://www3.jma.or.jp/foodex/ja	TEL: +81-3-3434-3453
	Supermarket Trade Show	
	http://www.smts.jp	TEL: +81-3-5209-1056
Exhibition of seafood and processed products	Japan International Seafood & Technology Expo	
	http://www.exhibitiontech.com/seafood/	TEL: +81-3-5775-2855

5. Failure Cases

In 2007, freshwater clams and agemaki clams (Sinonovacula constricta) were imported from Korea when an insecticide called endosulfan was detected with higher amounts than the safety standard levels. In the same year, synthetic antibiotics called malachite green were detected from processed mackerel (saba) products (fillet) imported from China. These incidents led to a drastic decrease in the importation of these products.

6. Import Associations & Related Organizations

Fig. 9-46: Seafood and processed product associations and related organizations

Japan Fisheries Association	http://www.suisankai.or.jp
japan@suisankai.or.jp	TEL: +81-3-3585-6681
National Cooperative Association of Squid Processors	http://www.zen-ika.com/index.html
info@zen-ika.com	TEL: +81-3-3834-3731
National Federation of Minced and Steamed White Fish Meat Manufacturers Cooperatives	http://www.zenkama.com/
info@zenkama.com	TEL: +81-3-3851-1371
National Federation of Processed Seafood Manufacturers Cooperatives	http://www.zensui.jp/
zensui@soleil.ocn.ne.jp	TEL: +81-3-3662-2040
Japan Fish Traders Association	http://www.jfta-or.jp/
fish@jfta-or.jp	TEL: +81-3-5280-2891

