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JETRO Japanese Market Report

—Regulations & Practices—

Canned Fish and Seafood Products

Introduction

This report has been compiled for the purpose of providing information regarding the laws, regulations, standards, pricing, commercial practices, distribution channels, consumption trends and other aspects of the current canned seafood industry in Japan. This report has been designed to assist companies and associated organizations interested in accessing the Japanese market.

The items that appear in the present survey are listed below, classified according to their HS code.[1]

HS Code	
1604. 11-090	Salmon（in airtight containers）
1604. 13-010	Sardines, sardinella and brisling or sprats (in airtight containers)
1604. 14-010	Bonito (in airtight containers)
1604. 14-092	Tuna (in airtight containers）
1604. 30-090	Caviar and caviar substitutes (other than *ikura* salmon roe)
1605. 10-010	Crab (in airtight containers; not smoked)
1605. 40-200	Crustaceans other than crabs, shrimps, prawns, lobsters, and ebi
1605. 90-212	Cuttlefish and squid (in airtight containers; containing rice)
1605. 90-213	Cuttlefish and squid (in airtight containers; Other)
1605. 90-291	Abalone (in airtight containers)
1605. 90-293	Other mollusks (in airtight containers)

[1] Items that are not specifically mentioned as hermetically sealed are included under this heading, although many of the products are actually imported in hermetically sealed packaging.

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Yen-US Dollar Exchange Rates

End of Year	Yen/US$
1997	129.2
1998	115.2
1999	102.1
2000	114.9
2001	131.5

Note : Mean value between offer and bid in the inter-bank foreign exchange market in Tokyo.

Source : Bank of Japan, “Financial and Economic Statistics Monthly”

Summary

Market Overview

Canned seafood production in Japan for domestic consumption and export followed a notably upward trend up to the 1970s. By the 1980s, however, it reached a plateau, reflecting the effects of (1) tightened international fishing restrictions, (2) diminished exports due to a persistently strong yen, and (3) the popularization of frozen foods and retort packages. Domestic production for the year 2000 was some 150,000 tons, totaling approximately 150 billion yen. Imports have been largely unchanged in terms of volume, but monetary value has been shrinking in recent years, reflecting the increase of imports of low-priced canned tuna and bonito, two key exports from Southeast Asia.

Import System

Canned seafood imports are subject to customs examination and inspection, based on Japanese food sanitation law, to determine their salability in Japan. It is strongly recommended to collect information in advance in order to pass inspection. In this case, enlisting the assistance of a Japanese importer or liaison company is indispensable. It is necessary to exercise particular vigilance here, as there recently have been cases of canned shellfish being found in violation of food additive regulations.

Distribution Conditions

Generally speaking, there are two canned seafood distribution channels. (1) This channel reaches major supermarkets, smaller supermarkets and convenience stores through the manufacturer (or importer), via a primary wholesaler route. (2) The second channel begins with the manufacturer (or importer) and goes to general food stores, bread-and-pastry shops and other retailers via primary and, subsequently, secondary wholesalers. In the case of canned abalone products, however, distribution routes are organized quite differently: Products reach Chinese restaurants either (1) through wholesalers specializing in Chinese cooking ingredients, or (2) from overseas manufacturers, directly through wholesalers specializing in Chinese cooking ingredients. The percentages of total sales, by retailer, include 20% for general major supermarkets (GMS), 30-40% for smaller supermarkets (SM), 20% for convenience stores (CVS), among others.

Consumption Trend

Annual household purchases of canned seafood exceeded 4,000 yen during the first half of the 1990s, but a declining trend ensued, and for 1996 and the years following, the figure shrank to just over 3,000 yen. Among the factors responsible for diminished canned seafood purchases are: (1) increases in the sales of precooked food, (2) greater popularization of frozen and retort packaged foods, (3) further popularization of home delivery and related services, with wider areas covered; advances in shipments using the cold chain system, and (4) diversification of consumer preferences and changes in lifestyles. The

best-selling types of tuna and bonito products, two mainstay import items, are multi-packs containing small cans that typically weigh less than 100 grams.

Advice on Market Access

The best access strategy will vary depending on how the organization intends to participate in the Japanese market, be it OEM-style product supply or direct export. In either case, it is of paramount importance to pay attention to the following details:

1. Selection of both an appropriate party to negotiate the deal and product(s) to sell,
2. Provision of information regarding product quality control and stable supply,
3. Sensitivity to the taste and preferences of Japanese consumers,
4. Understanding of Japanese import laws and regulations, and
5. Utilization of trade fairs as a source of relevant information.

I. Market Overview

A. Domestic Market Trends

From the post-World War II years through the 1970s, Japanese production of canned seafood for both domestic consumption and exports maintained a consistently upward trend, culminating in total annual production of some 450,000 tons in 1980. Of this, 190,000 tons consisted of mackerel and sardines in tomato sauce or spices, or filets in oil, and tuna packed in water. These were exported to markets around the world.

After 1980, however, production began to slow down. The principal causes for this decline, as seen from the standpoint of the manufacturer, were:

(1) The establishment of the 200-mile exclusive fishing zone (coastal economic zone), which drove onboard cannery operations of salmon and crab factory ships out of business.

(2) The prohibition of commercial whaling that wiped out canned whale meat production, which depended on baleen whale catches and accounted for a substantial portion of the meat supply to the domestic market.

(3) The dwindling of mackerel resources in Japanese waters, followed in the 1990s by the diminishing of sardine resources, which previously were abundantly available as a replacement for mackerel. This situation was exacerbated by increases in the cost of raw materials for canned seafood production brought on by an intensified price maintenance policy implemented through fishing restrictions and adjustments as best exemplified by the saury catch.

(4) Technical sophistication in food production and packaging technologies in the non-canned food sectors. These were eventually emulated by canned-seafood manufacturers who installed comparable equipment and facilities on their cannery premises, and ended up revamping their management setups and suspending or terminating part of their cannery operations.

Meanwhile, the same developments were viewed by the consumer as having been caused by a number of problems needing to be addressed such as:

(1) The industry's aloofness concerning health concerns and consumer preference for freshness.

(2) The labor involved in used can disposal.

(3) A mistrust of canned food pricing generated by the frequency of special bargains promoted by mass merchandise handlers.

(4) The lack of novelty in product development compared with competing processed foods.

(5) The negative effects of the addition of packing media such as water, oil, liquid seasonings, etc. (heavier cans; unappetizing consistency; excessively generic-tasting contents; mushy—lack of solid food flavor).

A decade-by-decade trend in decreasing canned seafood production from the 1980s onward is evident from the fact that the figure of 194,200 tons for 1990 represents a 57% decrease from 448,000 tons for 1980 and 152,200 tons for 2000 represents a 22% decrease from the 1990 figure.

While domestic production shrank, imports accounted for increasingly larger shares of the Japanese market. Using the formula [domestic production volume + import volume – export volume = assumed canned seafood market size], it can be ascertained that market share held by imports in 1980 was less than 1%, but in 1990 the figure rose to approximately 3%, growing to 15% for 2000. Exports, on the other hand, saw a notable decline to the tune of 5,700 tons by 2000.

The canned seafood market, which had stayed the same size, began to shrink in the mid-1990s. Market shrinkage notwithstanding, product development attempts by canned seafood producers continued, led by the major manufacturers. Novelties that hit the market this past decade, for example, have included simply boiled canned items with an enhanced value as cooking ingredients and their large volume versions for restaurant use. These include canned backbones (used as a calcium supplement) of autumn salmon caught off the Sanriku Coast, high-vacuum canned products without packing media, see-through-canned products and various canned side dishes using seafood products as the main ingredients. Few of these new ideas, however, survived in the market. In recent years, there has been an expanding market for anchovies and oil-packed sardines, mirroring the deep-rooted popularity of Italian cuisine and a suddenly mushrooming market demand for blue-skinned fish products (sardines, saury, mackerel, etc.) based on the sudden surge in demand in 1999 for fish products high in DHA, which is said to have health benefits. Also in 1999, there was renewed interest in canned foods as an emergency food supply in readiness for any Y2K-related disasters, bringing about a boost in sales for canned food overall by some 20%. These developments, however, were little more than short-lived one-time events that never gained sufficient momentum to stimulate the canned food market as a whole. For 2001, the market is expected to have declined a further 10% over 2000 due to excess stores of inventory.

Chart 1. Trends in Canned Seafood Production Volume

（tons）

	1998	1999	2000
Tuna varieties	65,967	65,507	69,470（45.7）
Mackerel	30,351	26,657	29,845（19.6）
Sardines	13,292	18,022	15,416（10.1）
Saury	10,592	8,438	9,886（ 6.5）
Shellfish	9,010	8,293	8,532（ 5.6）
Salmon	4,902	6,019	6,104（ 4.0）
Crab	5,201	5,201	4,700（ 3.1）
Squid	3,627	3,022	2,924（ 1.9）
Other	7,857	6,685	5,277（ 3.5）
Total	150,709	147,844	152,154（100.0）

Source: “The Canners Journal,” Japan Canners Association, (August, 2001 issue).
Note : Figures in parentheses represent percentages in relation to the total.

Chart 2.　Trends in Canned Seafood Production (Monetary Value)

（unit: 100 million yen）

	1997	1998	1999	2000
Tuna and bonito	521	521	490	512（35.4）
Crab	229	194	194	188（13.0）
Mackerel	144	147	135	155（10.7）
Sardine	78	86	116	81（ 5.6）
Salmon	62	61	81	74（ 5.1）
Other	550	468	438	437（30.2）
Total	1,584	1,477	1,454	1,446（100.0）

Source: Same as Chart 1.

Note　: Figures in parentheses represent percentages in relation to the total.

B. Trends in Imports

Canned imports remain largely unchanged in terms of quantity, but there is a downward trend in terms of value. In 2000 it was 13 billion yen, representing a 29% decrease over the 18.3 billion yen in 1997. This trend was chiefly caused by massive imports of cheap tuna products, the main import item, from Thailand, Indonesia and elsewhere. On the other hand, imports of canned salmon for the same year saw a 100% and a 150% jump, respectively, over the preceding year in both value and quantity. Canned salmon imports from Kamchatka, which were launched in 2000, were the major reason for this development.

In terms of volume, tuna products accounted for more than 80% of the total imports for 2000, but in terms of value, the share of tuna products was approximately 50%. On the other hand, abalone and caviar, which have high unit prices, claimed a 20% and a 15% share, respectively.

The market share of canned imports in 2000 (in volume terms) was 15%, as previously mentioned, and has continued to increase yearly (cf. I – Market Overview, A – Domestic Market Trends). A product-by-product market share survey shows that imports account for about 40% of all tuna, and virtually 100% of the caviar market.

Chart 3. Item-by-Item Trend Breakdown for Canned Seafood Imports

(Value – millions of yen; volume – tons)

		1997	1998	1999	2000
Tuna	Value	9,100	8,503	6,912	6,427 (49.4)
	Volume	20,975	18,203	18,777	20,716 (81.1)
Abalone	Value	3,542	2,405	2,037	2,513 (19.3)
	Volume	526	412	409	413 (1.6)
Caviar and generics	Value	2,382	2,208	1,414	1,741 (13.4)
	Volume	495	443	545	796 (3.1)
Bonito	Value	824	977	1,010	584 (4.5)
	Volume	1,580	1,682	2,301	1,574 (6.2)
Crab	Value	992	285	228	270 (2.1)
	Volume	306	151	118	102 (0.4)
Sardine	Value	190	226	236	216 (1.7)
	Volume	220	231	255	276 (1.1)
Salmon and trout	Value	236	104	101	208 (1.6)
	Volume	245	79	131	322 (1.3)
Other	Value	1,002	1,042	1,090	1,042 (8.0)
	Volume	1,156	1,107	1,141	1,342 (5.2)
Total	Value	18,268	15,750	13,028	13,001 (100.0)
	Volume	25,503	22,308	23,877	25,541 (100.0)

Source: Same as Chart 1.

Note : Figures in parentheses represent percentages in relation to the total.

Ⅱ. Import System and Related Laws and Regulations

Canned seafood can be imported by anyone once the given inspection has been passed.

A. Customs Regulations and Procedures

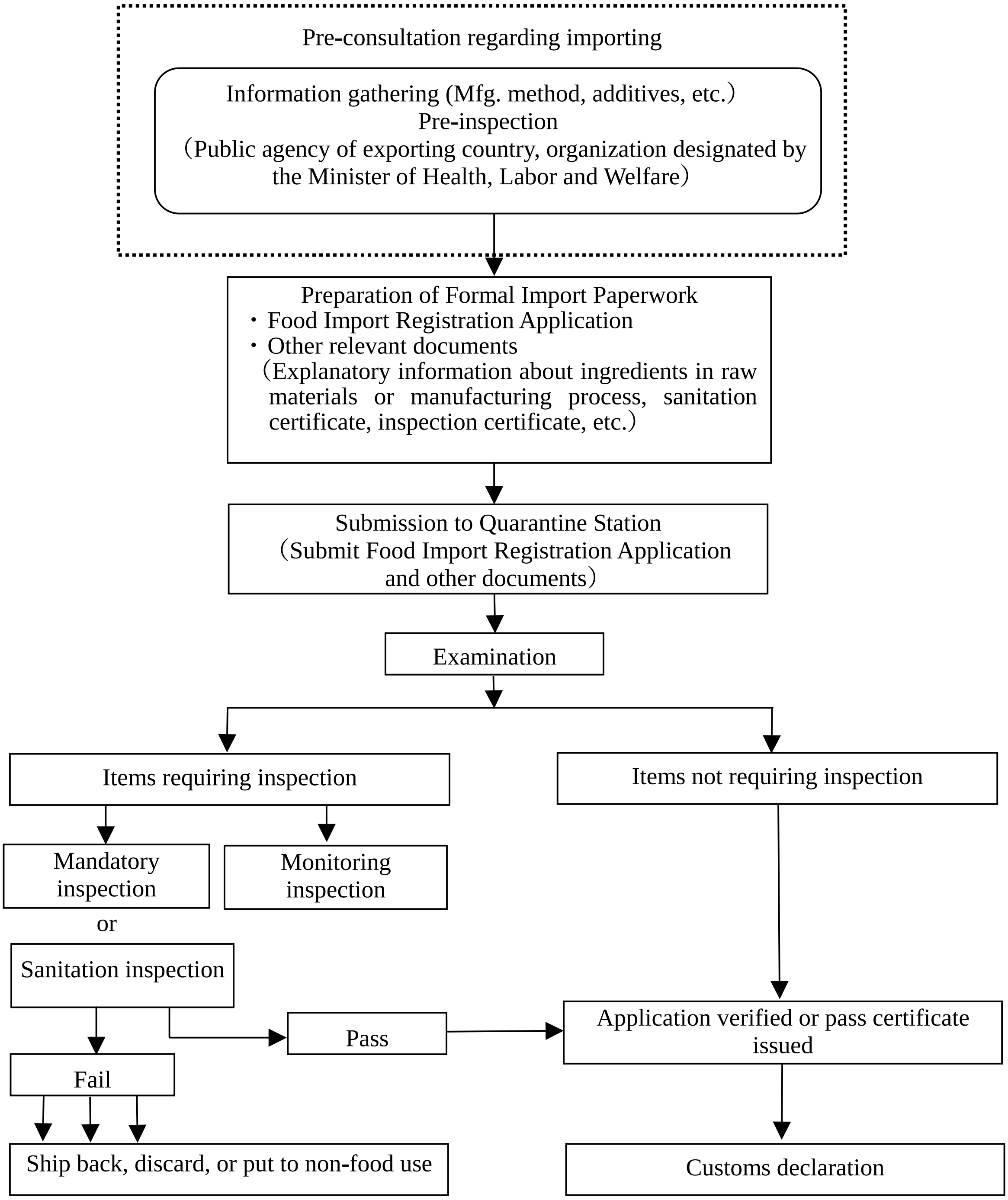
The most important law applicable to the import and sales of canned seafood is the Food Sanitation Law. The purpose of this law is to set standards, from the standpoint of public health, concerning the ingredients and additives in food products to be sold in Japan. Through screening and inspection, the salability of the food in question is determined. This set of laws sets forth provisions regarding production methods for various foodstuffs and standards and criteria for food additives and other substances. (This includes which additives are allowed, as well as the maximum allowable concentrations of these additives). Additionally, for canned seafood, special provisions are in effect regulating the criteria for the use of antioxidants and other additives. In recent years there have been instances of violations in the form of excess residue of EDTA calcium-2-sodium, sulfur dioxides, and similar compounds present in canned shellfish and other products. Consequently, vigilance in this area is essential.

Screening and inspection, based on the Food Sanitation Law, is conducted by the quarantine station prior to the import customs declaration. The main procedures of the screening and inspection process are:

(1) The importing party submits a Food Importation Registration Application for the canned foods to be imported, with a set of necessary documents attached to the quarantine station assigned to imported foodstuffs inspection.

(2) The quarantine station examines the importation registration form, scrutinizes items which require sanitation inspection, determines their import-worthiness or lack thereof, and notifies the importer of the determination. The screening and inspection process at the quarantine station is illustrated in Chart 4.

Chart 4. Import Procedure Prescribed by the Food Sanitation Law



It is possible to simplify import procedures. Here are some useful simplification procedures:

Simplifying Import Procedures

●The Pre-Application System

The quarantine station starts accepting applications seven days before the scheduled date of arrival of the commodity in question. Except for items that absolutely require inspection, if the importer submits a pre-application in advance, the quarantine station will issue the importer a registration application form prior to, or immediately following, the arrival of the imported commodity.

●The Plan-Based Importation System

If imported products are such that the same place of manufacture, raw materials and manufacturing methods are to be used on a continuous basis, the importer may attach an import plan detailing the next one to three years. This document may be submitted to the quarantine authority along with the Food Import Registration Application at the time of initial import. If the plan passes the examination, the importer will be exempted from the food import application submission process for the applicable period.

●Ongoing Import System

If the same food is to be imported on an ongoing basis, the importer may attach a physical and chemical test result certificate at the time of the initial import. If the product passes the examination, the importer will be exempted from physical and chemical tests on said item for the applicable period.

●Recognition of Test Result Certificates by Foreign Official Inspection Agencies

A certificate issued by an inspection agency of a foreign government recognized as a testing organ vested with specific test and inspection functions, and registered with the Public Welfare and Labor Ministry as a testing organization, will be treated as though it were issued by a Japanese inspection agency. This provision, however, will not apply to the results of tests on germs and molds, which may undergo changes during transport.

●The Food Import Pre-Confirmation System

A foreign manufacturer may, through an appropriate government agency of its home country and its diplomatic legation in Japan, request of the Japanese Health, Labor and Welfare Ministry a pre-screening of the items to be exported to Japan to ascertain conformity to the relevant standards and criteria stipulated by the Food Sanitation Law of Japan. When this pre-screening process is passed, the product in question and its manufacturer will remain registered with the Health, Labor and Welfare Ministry for the applicable period. Examination of the food importation registration application executed during said period will be immediately followed by the issuance of a food import registration certificate. Monitoring inspections will be conducted on registered products.[2]

It is worth noting, however, that since this scheme may not be compatible with the systems of some countries, foreign manufacturers will need to inquire about this at the appropriate government agency in their home country.

In addition, in the interest of speeding up import procedures, it is necessary to conduct careful preliminary research to make sure that the raw materials, additives, manufacturing and processing methods and container configuration and/or packaging pertaining to the potential product are in

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2 Processed foods will be inspected for sorbic acid, benzoic acid, sulfur dioxide, coloring, polysorbate, TBHQ, etc. (as of 2000).

conformity with the Food Sanitation Law.

For specifics on the procedure in question, contact:

Quarantine Service Management Division
Planning Section, Food Insurance Department
Medical and Pharmaceuticals Bureau
Health, Labor and Welfare Ministry
Telephone: 03-3502-8111 (switchboard operator)

B. Product Information Display Regulations and Information To Be Displayed

In selling canned seafood to the consumer, the marketer is duty bound to display information describing the contents of the product on the packaging or container. The laws governing this requirement include the Food Sanitation Law, the Act Against Unjustifiable Premiums and Misleading Presentations, and the Measurement Law. Furthermore, there may be additional applicable information display requirements imposed by local governments for products to be sold in their markets.

Based on the above laws, information which must be displayed on canned seafood to be sold in Japan are as follows:

- Designation of product
- Weight of contents (in grams)
- Shelf life (quality preservation time frame)
- Name and address of importer/distributor
- Country of origin
- Preservation method
- ”How to consume” information

Sample label

Designation of Product: Tuna in oil (chunk)
Ingredients: Tuna, soybean oil, salt, seasoning (amino acid, etc.)
Net weight: 80 grams
Gross weight: 100 grams
Shelf life: “Best before date” inscribed on can top
Storage method: Keep out of direct sunlight
Country of origin: Thailand
Imported by: XX Food Co., Ltd. Xxx Chuo-ku, Tokyo

The above information must be displayed on a product which is to be marketed in Japan. As such the information must be prepared in Japanese before the product can be sent through distribution channels. Typically, merchandise bound for distribution channels immediately following customs clearance will have a Japanese-language sticker glued to each of the smallest unit of sale, or each unit is wrapped in paper bearing Japanese-language indications.

C. Import Duty and Sales Tax

Itemized import tariffs on canned seafood are as shown in Chart 5. As for applicable tariff rates, no tariff (*) will be levied on products originating from the recently developing group of countries to which most-favored-nation treatment is accorded, while the WTO tariff rates will apply to WTO member countries with the exclusion of developing member countries. A sales tax of 5% will be levied at the point of sale.

Chart 5. Priority Rate of Duty on Seafood

(%)

HS Code	Item	Basic	WTO	MFN
1604. 11-090	Salmon (in airtight containers)	9.6	(9.6)	
1604. 13-010	Sardine, sardinella, and brisling or sprats (in airtight containers)	9.6	(9.6)	7.2*Tariff-free
1604. 14-010	Bonito (in airtight containers)	9.6	(9.6)	6.4*Tariff-free
1604. 14-092	Tuna (in airtight containers)	9.6	(9.6)	7.2*Tariff-free
1604. 30-090	Caviar and substitutes (other than *ikura* salmon roe)	6.4	(6.4)	4.8*Tariff-free
1605. 10-010	Crab (in airtight containers)	6.5	5	5*Tariff-free
1605. 40-200	Crustaceans other than crabs, shrimps, prawns, lobsters, and ebi	9.6	(9.6)	7.2*Tariff-free
1605. 90-212	Cuttlefish and squid with rice (in airtight containers)	15	10.5	9*Tariff-free
1605. 90-213	Cuttlefish and squid, other (in airtight containers)	15	10.5	9*Tariff-free
1605. 90-291	Abalone (in airtight containers)	9.6	(9.6)	7.2*Tariff-free
1605. 90-293	Other mollusks (in airtight containers)	9.6	(9.6)	7.2 *Tariff-free

Source: Customs Tariff Schedules of Japan, Japan Tariff Association

D．Can Configuration Specifications

Designations and specifications for seafood can configurations in Japan are as follows:

Chart 6.　Japanese Can Dimensions (for Canned Seafood)

Can Type	Inner Diameter (mm)	Height (mm)	Content Volume (ml)
Type 1 Can	153.4	176.8	3,088
Type 2 Can	98.9	120.9	870
Type 3 Can	83.3	113.0	573
Type 4 Can	74.0	113.0	453
Type 5 Can	74.0	81.3	318
Type 6 Can	74.0	59.0	223
Type 7 Can	65.3	101.1	317
Special Type 7 Can	65.3	75.7	233
Type 8 Can	65.3	52.7	153
Flat Type 1 Can	98.9	68.5	470
Flat Type 2 Can	83.3	51.1	240
Flat Type 3 Can	74.0	34.4	119
Type 2 Can for Crab	73.3	55.9	265
Type 3 Can for Crab	74.0	39.2	139
Small Type 1 Can	52.3	88.4	175
Small Type 2 Can	52.3	52.7	100
Type 1 Can for Tuna	98.9	59.0	398
Type 2 Can for Tuna	83.3	45.5	208
Type 2 DR Can for Tuna	83.2	44.1	213
Type 3 Can for Tuna	65.3	39.2	109
Type 3 DR Can for Tuna	65.3	37.8	111
2-Kilo Can for Tuna	153.4	113.8	1,961
Pocket-size Type 2 Can	98.9	36.3	226
Pocket-size Type 3 Can	83.8	30.3	125
Pocket-size Type 4 Can	74.0	30.3	102
Pocket-size 4DR Can	73.9	28.8	104

Source: “Canning Handbook,” Japan Canners Association.

Ⅲ. Distribution Situation and Commercial Practices

A. Domestic Distribution Channels

Generally, Japanese domestic distribution channels are organized as shown in Chart 7. There are two major types of channels:

(1) This channel starts with the manufacturer (or importer) and, via the primary wholesaler (who may in some cases double as the canner), leads to major as well as smaller supermarkets and convenience stores. In this case, the “soft” flow (flow of vouchers, information, etc.) is separate from the “hard” flow (flow of the merchandise proper), and the merchandise proper is typically delivered from the manufacturer (or importer) directly to the primary distribution centers of major store chains.

(2) This channel begins with the manufacturer (or importer) and, via the primary and the secondary wholesaler, leads to general food stores and bread-and-pastry shops. In this case, the “soft” and “hard” flows are not separate. Canned foods do not require costly storage and display spaces, Accordingly, they enjoy high display and exposure rates at food stores and small shops.

Of the total retail sales pie, major supermarkets (GM) claim a 20% slice, smaller supermarkets (SM) 30-40% and convenience stores (CVS) 20%, while other retail outlets account for the remainder. Department stores normally account for 10%, but for July-August and December, the gift-giving seasons in Japan, the market share for department stores soars to almost 50%.

Abalone is an item wholesaled largely to Chinese restaurants for regular food service consumption. For this reason, it moves through a distribution channel that is quite different from the general canned food distribution channel (see Chart 8). Two channels can be distinguished in this case, as well:

(1) The first channel starts with the overseas manufacturer and, via a major trading firm and a wholesaler specializing in Chinese cooking ingredients (and possibly an additional secondary wholesaler), leads to the Chinese restaurant end-user.

(2) The second channel starts with the overseas manufacturer and, via a wholesaler specializing in Chinese cooking ingredients (and possibly an additional secondary wholesaler), leads to the Chinese restaurateur end-user.

Chart 7. Canned Seafood Distribution Channels

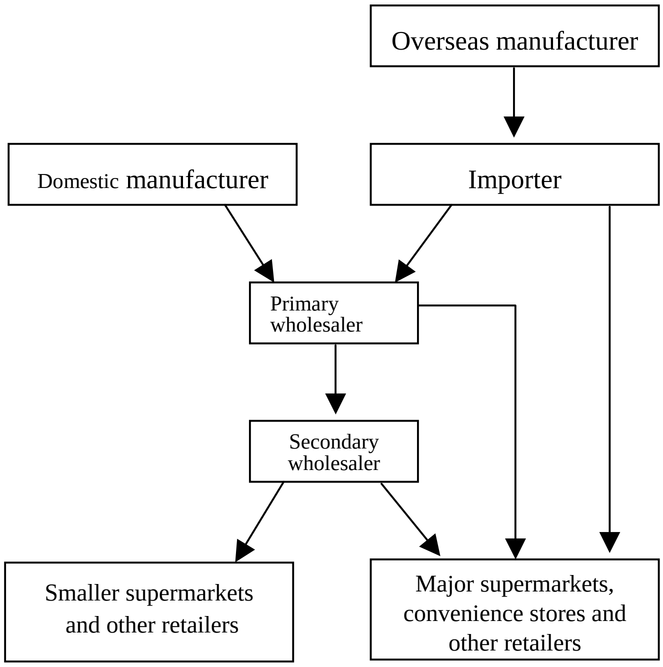
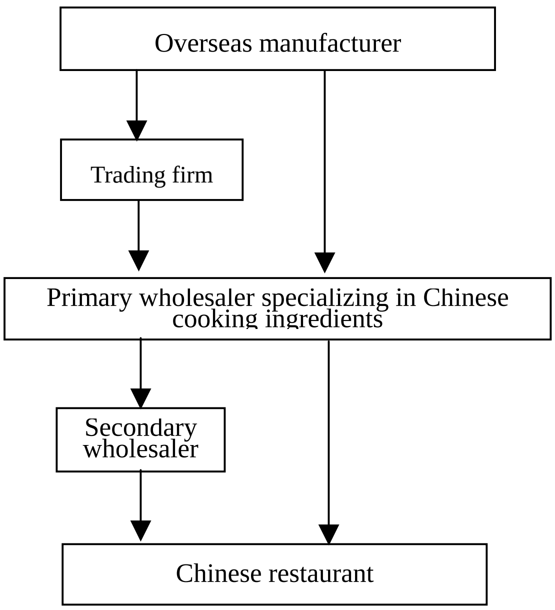


Chart 8. Canned Abalone Distribution Channel (for commercial consumption only)



B. Distribution Costs and Retail

Recent years have seen a trend toward lower retail prices on canned seafood. According to industry insiders, average storefront prices have been falling on the average of 2% yearly. The following points are cited as factors responsible for this trend:

(1) A canned seafood glut is occurring because of the ongoing launching of new products by the manufacturers despite the trend toward market shrinkage.

(2) Major and smaller supermarkets, which constitute leading retail outlets, sell the products in packs at reduced prices.

(3) Perishable foods prices have continued a downward trend. This was especially true of beef in 2001 (an effect of BSE, or bovine spongiform encephalopathy, the so-called mad cow disease), fruit (bumper crop at home), vegetables (Chinese imports), and fresh fish (rich haul of saury, mackerel, horse mackerel and autumn salmon).

(4) Major and smaller supermarkets in urban districts tend to be overstocked, setting in motion a tendency for reduced-for-quick-sale closeouts.

(5) A prolonged recession, coupled with media reports about an ongoing deflationary spiral, has had a chilling effect on consumer psychology. This tends to make consumers hold off on buying items with a long shelf life, such as canned foods.

To counter this trend, measures are being taken to reduce inventory through special sales. The discount margin is absorbed by the manufacturer, whose profit will thus be compressed, but in many cases this is not optional, as priority is placed on maintaining factory operations. However, the manufacturer's ex-factory price, as opposed to the manufacturer-recommended retail price, used to be set at 50%, but in recent years, as increasing demand in special sales held at mass-merchandising stores, coupled with more sophisticated production engineering has led to greater flexibility in negotiations between sales representatives and mass merchandisers. This has led to considerable increases in manufacturer-recommended retail prices, while ex-factory prices have dropped to 42-48%. Understandably, a setup that allowed factories to secure profitability (or minimize prices on purchases from cooperating factories) and sales departments to post deficits just deep enough not to exceed the factory's profit, would be quite compatible with the canned seafood business.

With traditional transactions, the margin of earnings is 35-40% of sale prices for retail transactions at general food stores and 10-13% for wholesale transactions. However, in cases where manufacturers make direct deliveries to primary distribution centers of major and smaller supermarkets and convenience stores, 35-45% goes to the retailer, 6-12% is the "center fee" to the distribution center, and 2-3% can be attributed to a voucher-handling fee to the wholesaler. The center fee refers to what the amount paid toward operational cost to the distribution center, and distribution center-to-retailers transportation cost. Retailers bill the manufacturer directly or through the wholesaler for amounts arrived at based on prorated burden sharing (in most cases, how the figures are determined is not disclosed).

In dealing with mass-merchandizing stores, it should be noted that it is standard practice to recoup costs incurred in addition to the center fee, including funds to support social events and an employee outsourcing. The former can be collected in connection with store openings, celebratory events, congratulations and condolences, accidents and disasters, as well as brochure reparation costs, and so forth. The latter is collected to support the supply of extra personnel in connection with such occasions as store openings, busy special sale functions, or the securing of part-timers. Additionally, when a sampling-and-sale publicity event is organized by a store, detailed instructions may be sent out to all concerned regarding the age, level of skill and treatment of the sampling-and-sale personnel to be dispatched, as well as the imposed sales target for the day.

In large cities, wholesalers are seen as increasingly shorn of their traditional wholesaler function, but in regional areas they continue to retain an advantageous position over retailers. Traditional wholesalers often demand a lot from the manufacturer in that they exhibit products at periodically organized exhibitions and foot the bill for the booth; they offer a rebate of several percent on purchases; they provide labor in the form of dispatching sales personnel; they provide support in storage facilities; they assist in inventory management; and they foot the bill for celebratory events.

VI. Consumption Trends

A. Purchase Amounts per Household

A household economy survey conducted by the Ministry of Public Management shows that the per-household annual expenditure on canned seafood, which was over 4,000 yen in the first half of the 1990s, has been declining (c.f. Chart 9). Factors responsible for the downturn in canned seafood purchases cited include:

(1) increasing popularity of pre-cooked meals,

(2) increasing development and popularity of refrigerated and frozen foods, and

(3) wider area coverage of food delivery services (to the home, for example) and increasing sophistication of cold chain storage and transportation.

Chart 9. Trends in Per-Household Annual Canned Seafood Purchases

(yen)

	1990	1997	1998	1999	2000
Expenditure per Household	4,002	3,336	3,182	3,191	2,898

Source: "Household Survey Yearbook 2000," Bureau of Statistics, Ministry of Public Management, Home Affairs, Posts and Telecommunications

B. Best-Selling Merchandise

Chart 10 lists the best-selling canned seafood from December 2000 to November 2001. [3] Several major seafood manufacturers (Maruha Sea Ace, Nippon Suisan, Sea Gourmet, among others) have withdrawn from the business of canned tuna and canned bonito packed in oil, which accounts for roughly half of the canned seafood market, leaving the products of Hagoromo Foods the *Sea Chicken* label with a substantial market share. Limiting the discussion to those categories in which Hagoromo Foods products count among the top five, this manufacturer now claims approximately 45% (in value) of the market for tuna packed in oil, and roughly a 90% share of the market for canned bonito in oil.

The best-selling canned tuna and bonito products packed in oil come in small sizes of less than 100 grams each, and are sold in multi-packs containing several cans. Since the way these products are packaged suits Japanese consumption preferences, they can be used on a daily basis. Thus, they are likely to be chosen for price slashing.

[3] Data cited here is based on a sample survey conducted by Nikkei QUICK Information Technology Co., Ltd. of 700 nationwide mass-merchandising stores, supermarkets and convenience stores (46 chains). Because the data is not adjusted to reflect what sizes the stores ordered, there may be a discrepancy between this chart as it appears and the reality of the situation.

Most bestsellers are domestic products; unique among them is a sardine product by King Oscar, the only imported product in this category. Canned sardines boast approximately a 10% share of the canned seafood market as a whole, and is an important item that follows tuna and bonito in oil. King Oscar products account for approximately 5% of the value of this slice of the market.

Chart 10. Top-selling Seafood Products by Type

Ranking	Name of Commodity	Manufacturer	Volume	Average price/ Yen
	Tuna Packed in Oil			260
1	HAGOROMO Sea Chicken L (Flake)	Hagoromo Foods	80g×4	359
2	HAGOROMO Sea Chicken L (Flake)	Hagoromo Foods	80g×5	430
3	HAGOROMO Sea Chicken L (Chunk)	Hagoromo Foods	165g	218
4	JUSCO TV Light Tuna (Flakes	Jusco	80g×5	395
5	HAGOROMO Sea Chicken Chef’s L (Flake) “Non”	Hagoromo Foods	80g×4	358
	Bonito Packed in Oil			270
1	HAGOROMO Sea Chicken Mild	Hagoromo Foods	80g×4	361
2	HAGOROMO CGC Sea Chicken N Mild	Hagoromo Foods	80g×4	357
3	HAGOROMO Sea Chicken Mild Bonito (Flake)	Hagoromo Foods	80g	115
4	HAGOROMO Sea Chicken Mild Bonito	Hagoromo Foods	165g	197
5	HAGOROMO Sea Chicken Mild	Hagoromo Foods	80g×5	484
	Canned Tuna			148
1	HAGOROMO Boiled Seasoned Tuna (Flake)	Hagoromo Foods	180g	130
2	DAIEI SV Non-oil Light Tuna (Flake)	Hagoromo Foods	80g×4	397
3	MARUHA Seasoned Tuna (Flake)	Maruha	145g	103
4	NISSUI Tuna Steaks	Nipponsuisan	150g	282
5	HAGOROMO Boiled Seasoned Tuna (Flake)	Hagoromo Foods	280g	201
	Canned Salmon			217
1	AKEBONO Pink Salmon	Nichiro	90g	210
2	AKEBONO Pink Salmon	Nichiro	180g	299
3	MARUHA Boiled Salmon Backbone	Maruha	90g	159
4	AKEBONO Boiled Pink Salmon	Nichiro	180g×3	715
5	HONIHO Boiled Salmon Backbone	Hoko Fishing	190g	109

	Canned Crab			380
1	MARUHA Pull-top Can Snow Crab (Flake)	Maruha	110g	329
2	NISSUI Red Snow Crab	Nippon Suisan	110g	402
3	MARUHA Deep–sea red crab (Flake)	Maruha	110g×3	787
4	NISSUI Snow Crab (Flake) Topped with Crab Leg Meat	Nippon Suisan	55g	219
5	Maruha Salafresh Crab (Flake)	Maruha	50g	180
	Canned Ark Shells			127
1	Maruha Large Boiled Seasoned Ark Shells	Maruha	150g	191
2	NISSUI Seasoned Ark Shells	Nippon Suisan	130g	99
3	HONIHO Seasoned Ark Shells	Hoko Fishing	170g	98
4	MARUHA Seasoned Ark Shells (from Ariake)	Maruha	65g	99
5	TAIYO Seasoned Ark Shells	Taiyo Bussan	130g	97
	Canned Bonito			111
1	MARUHA Seasoned Bonito (Flake)	Maruha	165g	95
2	HAGOROMO Seasoned Bonito (Flake)	Hagoromo Foods	180g	123
3	MARUHA Seasoned Bonito (Flake)	Maruha	180g	149
4	INABA Bonito, Lightly Boiled in Soy Sauce	Inaba Foods	85g	95
5	HONIHO Seasoned Bonito (Flake)	Hoko Fishing	180g	153
	Canned Saury			125
1	MARUHA Broiled Saury	Maruha	100g	97
2	MARUHA Broiled Saury	Maruha	100g×3	290
3	NISSUI Broiled Saury	Nippon Suisan	100g	97
4	MARUHA Broiled Saury	Maruha	100g×4	316
5	MARUHA Select Broiled Saury	Maruha	100g	146
	Canned Mackerel			117
1	MARUHA Canned Boiled Mackerel	Maruha	220g	129
2	MARUHA Mackerel in Miso	Maruha	190g	128
3	MARUHA Mackerel in Miso	Maruha	200g	97
4	NISSUI Mackerel in Miso	Nippon Suisan	200g	99
5	MARUHA Seasoned Mackerel	Maruha	200g	98
	Canned Sardines			146
1	MARUHA Seasoned Sardines	Maruha	100g	105
2	AOHATA Anchovy Fillets in Oil	Nakashimato	45g	320

3	MARUHA　Sardines in Miso	Maruha	100g	105
4	KING OSCER　SARDINES	King Oscar	70g	234
5	MARUHA　Premium Seasoned Sardines	Maruha	100g×3	292
	Canned Clams			206
1	MARUHA　Shelled Boiled Clams	Maruha	180g	258
2	MARUHA　Shelled Boiled Clams	Maruha	90g	179
3	HAGOROMO　Home Style Boiled Clams	Hagoromo Foods	170g	297
4	Hasshakai　V-Brand Shelled Boiled Clams	Hasshakai	150g	223
5	MARUHA　Pull-top Seasoned Clams	Maruha	150g	243
	Canned Scallops			360
1	NISSUI　Boiled Scallops	Nippon Suisan	110g×3	885
2	NISSUI　Boiled Scallops (Flake)	Nippon Suisan	70g	206
3	NISSUI　Boiled Scallops (Flake)	Nippon Suisan	70g×3	507
4	NISSUI　Boiled Scallops	Nippon Suisan	110g	461
5	NISSUI　Boiled Scallops	Maruha	70g	322
	Other Canned Seafood			172
1	MARUHA　Seasoned Squid	Maruha	155g	235
2	NISSUI　Seasoned Squid	Nippon Suisan	120g	99
3	MOMOYA　“New” C-A-N　Sea Bream in Miso	Momoya	120g	194
4	NISSUI　Whale Meat in Soy Sauce	Nippon Suisan	-	310
5	KYOKUYO　Whale Meat boiled in Soy Sauce	Kyokuyo	130g	484

Source: Nikkei POS Data from December 2000 to November 2001（Nikkei QUICK Information Technology Co., Ltd.）Explained in detail in Reference 1.

V. Advice on Market Access

A. Selection of the Appropriate Importer and Type of Product

Broadly speaking, there are two ways to participate in the Japanese market: product export, and generic product supply (comparable to an OEM arrangement), each with its own market access methodology.

Many foreign manufacturers participate in the Japanese market under the OEM-type arrangements. Of the products offered by Japanese manufacturers, some 35% are said to be OEM-supplied imports, and this percentage increases each year. An overwhelming majority of such OEM items are mostly canned tuna products which are internationally standardized in both raw materials and taste. Some Japanese companies, however, are showing an interest in OEM-supplied canned blue-skinned fish products (canned sardines, saury and mackerel). Therefore, an attempt to make inroads into that niche may prove a worthy undertaking. One other “trail-blazing” idea would be to approach a major mass merchandiser and offer private brand (PB) production. The major mass merchandiser would typically require a technical tie-up with a Japanese national-brand (NB) manufacturer, and so it would be advisable to already have a good, working relationship with a respectable NB manufacturer before making the proposal. When the negotiation bears fruit and production is ready to begin, it is important to be mindful that the same kinds of fish must be used as are used by Japanese seafood packers (that is, the same genus with room for some species diversity).

Exporters of canned seafood to Japan should know that bright prospects lie in products that are not offered by Japanese manufacturers, unique products that answer latent demands of the niche market. To name just a few examples, one might contemplate items along the lines of canned, oil-packed, salted anchovies (salted anchovies themselves being extensively known and used in Japan as a seasoning); low-temperature-sterilized, canned products needing refrigeration; canned fish-meat sausage; canned fish eggs, fish ovaries and fish testicles; canned pet food, etc. Good candidates to approach as importers are the major canned seafood manufacturers, importers who deal in unique products and trading firms that wholesale large volumes of imported goods to high-end supermarkets.

B. Providing Information regarding Quality Control and Stable Supply

Japanese importers and sales outlet operators attach a great deal of importance to consistent quality and stable supply. Furthermore, regulation tightening has been in progress for some years now with the enactment of various laws such as the Product Liability Law, legal requirement of the display of specified raw materials (allergenic substances, environmental hormones, etc.), the new JAS Law, the

Containers and Packaging Recycling Law, HACCP Certification Guidance, and others. Therefore, without the supportive guidance of Japanese contacts, participation in the Japanese market would not be easy. A foreign manufacturer's sales representative with only sample products in hand would indeed face bleak prospects in negotiations. To move the negotiation forward to a meaningful conclusion, the foreign manufacturer would have to provide the Japanese company with a wealth of useful, all-encompassing information, including the company's performance record, financial bearings, manufacturing methods, production setup, status of mechanical equipment, quality control methodology, modality of raw material procurement and processing, costs, the geographical situation of the factory, and the home country's policy orientations. The material presented should be aimed at thoroughly convincing the other party of the foreign manufacturer's strengths.

In the case of OEM-format production, in particular, a candidate company engaged in both the seafood product business and the packing business would stand a better chance. The reason is that such a company would be better positioned to maintain constant raw material costs and even be able to reduce raw material prices when possible. Furthermore, a manufacturer who owns a factory near a port would be in an advantageous position from which to negotiate, to the extent that the raw materials used would be perceived as the fresher and tastier.

C. Understanding Japanese Consumer Preferences

Typical Japanese tastes in food are such that they often distinguish the most delicate differences in taste and flavor, and there are even expressions to describe these distinctions. Reportedly, there are 78 words in English that express tastes, flavors, textures, etc. in food, while there are 406 such words in Japanese. Accordingly, it would be next to impossible to translate Japanese expressions of gustatory delight into foreign languages, making it indispensable, when planning, developing and designing a product, to have a Japanese taste expert on-site to advise production personnel, rather than have them poring over written instructions.

Over the last several years, the Japanese processed food industry has made substantial progress in improving the taste and quality of food through the application of the results of scientific research in such fields as the constituent elements of food, the measurement of taste-bud sensitivity, the microstructure of food texture, food properties, and other factors. It is a fact, however, that the merits of such research results do not completely benefit the flavors of canned foods, which undergo high-temperature treatment during processing.

A look at canned seafood consumed in Japan shows that many products are seasoned to suit unique Japanese tastes using soy bean paste (*miso*), soy sauce (*shoyu*), and other flavorings, while canned tuna and bonito, the mainstay items, are preferred packed oil rather than boiled in water. Contents are packed in small cans, the pull-top type of can being the prevailing standard. It should also be noted that

Japanese consumers tend to reach for products with the latest expiration date. Foreign manufacturers will therefore need to heed and respond to these aspects of Japanese consumer preferences.

D. Understanding of Import-related Rules, Regulations and Other Matters

There are all sorts of rules and regulations in the Japanese market applicable to customs clearance and the act of selling. It is necessary to develop a full understanding of them and to obtain and study all pertinent information to satisfy these regulations. It is of particular importance to go over all details pertaining to the first shipment with utmost care. Highly detailed questions and demands for improvement may be sent in from the importer or the Japanese partner-manufacturer. The ability to respond in good faith with diligence and thoroughness from an expert's standpoint will open the way to the maintenance and expansion of export activity. Comprehensive before-the-fact investigation, as well as good cooperation from the importer or partner manufacturer in Japan, are indispensable to lasting success.

E. Making the Most of International Trade Fairs and Export Promotion Organizations in the Home Country

Japan hosts a variety of trade shows, and foreign manufacturers may be able to seize new opportunities for participation in the Japanese market by taking part in or visiting such events. Contacts made at trade fairs directly leading to the successful clinching of a business deal are rare, but such contacts will later prove to create an arena for making the products and company name known to Japanese companies.

While there are no trade fairs specializing in canned seafood, there are several food and beverage trade fairs. In taking part in or visiting such fairs, it is important to collect information ahead of time by inquiring of the organizers whether canned seafood business promoters are exhibiting, and whether transaction information can be obtained at the site.

For reference, an outline of FOODEX JAPAN (Japan's largest food and beverage trade fair, which attracts many foreign participants) and other important Japanese trade fairs is included in Reference 7.

Export promotion agencies from a number of countries are frequent participants in Japanese trade fairs. They participate to support exports of their domestic products. Making the most of such programs would certainly be a wise move for any prospective exporter.

Reference 1．Footnote:

Chart 10. Top-selling Seafood Products by Type

1. Tuna packed in oil

Sea chicken is an internationally accepted common term for tuna or bonito packed in oil. In Japan, “Sea Chicken” is the trade name of the Hagoromo Foods, a seafood product canning company. Fillets that don’t include the darker flesh portions are canned as “sea chicken.” All companies use the flaky portion of yellowfin tuna.

L flake (or light flake) indicates that yellow fin tuna (occasionally bigeye tuna) is used. Long fin white tuna is used when packages are labeled white flake.

	KIHADA MAGURO	MEBACHIMAGURO	BIN-NAGAMAGURO
Scientific Name	Thunnus Albacores	Thunnus Obesus	Thunnus Alalunga
English Name	Yellow fin tuna	Bigeye tuna	Albacore or Long fin white tuna

2. Bonito packed in oil

All companies use either flakes or chunks of bonito in vegetable oil.

	KATSUO
Scientific name	Euthynnus pelamis
English name	Bonito or Skipjack tuna

3. Canned tuna

This is flakes and steaks (small fillets) of various types of tuna in seasoning. The non-oil light tuna (flake) produced by Daiei SV is canned in lightly salted water. Seasoning sauces (containing soy sauce, sugar, salt, and other flavorings) are blended using proprietary recipes that vary from company to company. The term “steak” means they are cut with portions of the dark colored flesh included.

4. Canned salmon

Salmon chosen for canning is mostly low-priced pink salmon.

	Scientific name	English name
KARAFUTOMASU	Oncorhynchus gorbuscha	Pink salmon
SHIROZAKE	Oncorhynchus keta	Chum salmon
BENIZAKE	Oncorhynchus nerka	Sockeye salmon
GINNZAKE	Oncorhynchus kisutch	Coho salmon
MASUNOSUKE	Oncorhynchus tshawytscha	King salmon
TAISEIYOSAKE	Salmon salar	Atlantic salmon

The head, internal organs and tail are then removed from the salmon, and it is trimmed to fit into cans before boiling. Backbone refers to the byproducts that remain after fillets are removed. Backbone refers to the portion of the fish which remains afer the fillets are removed.

5. Canned crab

Companies mainly produce flake (loose) crab in cans. Only Nippon Suisan dresses the top of their shredded crab with crab leg meat.

	Scientific name	English name	Fishing grounds
ZUWAIGANI	Chionoecetes opilio	Snow crab	
BENIZUWAIGANI	Chionoecetes japonicus	Red snow crab	Japan Sea
MARUZUWAIGANI (O-OENKOUGANI)	Geryon maritae	Deep-sea red crab	Off African southwest Coast

6. Canned ark shells

Normally these are shelled and seasoned half-crenated ark shells, which are closely related to Broughton's ribbed ark shells.

	Scientific name	English name	Remarks
AKAGAI	Scapharca broughtonii	Broughton's ribbed ark shells	Expensive
SARUBOUGAI	Scapharca subcrenata	Half-crenated ark shells	From China

7. Canned bonito

Seasoned flakes are used for canning.

8. Canned saury

All companies broil saury with soy sauce before canning.

The saury are split and the heads, internal organs and tails are removed before it is air-dried to reduce water content. After being dried they are broiled, cooled and canned in seasoning (soy sauce, sugar, amino acids, thickening agents and other ingredients are used) as packing media.

	Scientific name	English name
SANMA	Cololabis saira	Pacific saury

9. Canned mackerel

There are three main types of canned mackerel, packed in water (lightly salted), cooked in *miso* (bean paste), and seasoned. These fish are packed after they have been dressed and cut into the proper size for the can, as are salmon. Atlantic mackerel has also been used in recent years since the price is attractive.

	Scientific name	English name
MASABA (HIRASABA)	Scomber japonicus	Pacific mackerel
GOMASABA (MARUSABA)	Scomber tapeinocephalus	Spotted mackerel
Norway SABA	Scomber scomber	Atlantic mackerel

10. Canned sardines

What is termed 'canned sardines' includes sardines and anchovies, as well as Japanese anchovies. *URUMEIWASHI* are not used for canning.

	MAIWASHI	KATAKUCHIIWASHI
Scientific name	Sardinops melanosticta	Engraulis japonicus
English name	Sardine or Pilchard	Japanese anchovy
Types of products	Maruha: Seasoned sardines Maruha: Sardines cooked in miso Maruha: Premium seasoned sardines These three products contain dressed sardines. The lower portion of small sardines are used in King Oscar brand sardines	Aohata: Anchovy fillets in oil Japanese anchovy fillets are used

11. Canned Clams

The production of boiled short-neck clams is increasing, while the canning of seasoned short-neck clams is decreasing.

When shelling short-neck clams, care must be taken to prevent sand and broken shells from getting mixed in.

	Scientific name	English name
ASARI	Tapes Japonica	Short-neck clam

12. Canned scallops

Most canned scallops are boiled. Only the adductor muscle of the scallop is used, and the internal organs are removed.

	Scientific name	English name
HOTATEGAI	Patinopecten yessoensis	Common scallop

13. Canned squid

Squid are cut into portions to match the can size. After the cartilage and internal organs are removed, the legs are stuffed into the bodies for packing. Most of the products are seasoned. Japanese common squid are normally used, but sometimes other varieties of squid are used.

	Scientific name	English name
SURUMEIKA	Todarodes pacificus	Japanese common squid

14. Red sea bream paste in cans

Each of the companies creates a paste from red sea bream meat and the company's proprietary seasoned *miso*.

	Scientific name	English name
MADAI	Chrysophrys major	Red sea bream

15. Canned whale

Minke whales caught for whale research activities are used. These products are made in two flavors, Asian barbecue, and boiled in a soy sauce-based seasoning mixture.

	Scientific name	English name
MINKUKUJIRA	Balaenoptera acutorostrata	Minke whale

Reference 2. Statistical Data Pertaining to Canned Seafood

Chart 11. Trends in Canned Tuna Imports, by Country

(Volume in tons; monetary value in millions of yen)

	1998		1999		2000	
	Volume	Value	Volume	Value	Volume	Value
Thailand	9,950	4,678	10,544	3,820	12,667	3,867
Indonesia	5,780	2,803	5,314	2,125	5,702	1,920
The Philippines	2,027	843	2,517	814	2,020	535
Malaysia	346	128	225	75	160	47
ROK	25	14	40	21	57	24
Total	18,203	8,503	18,777	6,912	20,716	6,427

Source: Same as Chart 1.

Chart 12. Trends in Canned Abalone Imports, by Country

(Volume in tons; monetary value in millions of yen)

	1998		1999		2000	
	Volume	Value	Volume	Value	Volume	Value
Australia	408	2,393	399	2,004	400	2,469
New Zealand	2	8	5	24	4	20
Total	412	2,405	409	2,037	413	2,513

Source: Same as Chart 1.

Chart 13. Trends in Canned Caviar & Caviar Substitute Imports, by Country (other than *ikura* salmon roe)

(Volume in tons; monetary value in millions of yen)

	1998		1999		2000	
	Volume	Value	Volume	Value	Volume	Value
Iran	16	707	12	539	10	629
Russia	1	27	14	477	12	494
USA	—	—	0	1	133	174
Denmark	353	144	408	146	568	137
Total	443	2,208	545	1,414	796	1,741

Source: Same as Chart 1.

Chart 14. Trends in Canned Bonito Imports, by Country

(Volume in tons; monetary value in millions of yen)

	1998		1999		2000	
	Volume	Value	Volume	Value	Volume	Value
Indonesia	1,300	834	1,475	736	1,023	432
Thailand	382	143	825	273	504	144
Total	1,682	977	2,301	1,010	1,574	584

Source: Same as Chart 1.

Chart 15. Trends in Canned Crab Imports, by Country

(Volume in tons; monetary value in millions of yen)

	1998		1999		2000	
	Volume	Value	Volume	Value	Volume	Value
Russia	59	194	65	174	60	216
Indonesia	71	68	45	41	32	34
Total	151	285	118	228	102	270

Source: Same as Chart 1.

Reference 3. Related Organizations

Name	Address	TEL / Fax/ URL
Ministry of Health, Labor and Welfare	1-2-2 Kasumigaseki, Chiyoda-ku, Tokyo 100-8045	Tel: 03-5253-1111 URL:http://www.mhlw.go.jp/
Ministry of Agriculture, Forestry and Fisheries	1-2-1 Kasumigaseki, Chiyoda-ku, Tokyo 100-8950	Tel: 03-3502-8111 URL:http://www.maff.go.jp/
Ministry of Economy, Trade and Industry	1-3-1 Kasumigaseki, Chiyoda-ku, Tokyo 100-8901	Tel: 03-3501-1511 URL: http://www.meti.go.jp/
Japan Canners Association	1213 North Denki Bldg., 1-7-1 Yurakucho, Chiyoda-ku, Tokyo	Tel: 03-3213-4751 Fax : 03-3211-1430 URL: http://www.maff.go.jp/ (Japanese Only)
Nihon Suisan Kanzume Packers Association	Echigoya Bldg, 8F, 1-1-6 Kyobashi, Chuo-ku, Tokyo 104-0031	Phone: 03-3281-7446 Fax: 03-3281-6854

Reference 4.　Manufacturer

Name	Address	TEL / Fax
Hagoromo Foods Co., Ltd. （Brand Name: HAGOROMO）	151 Shimazakicho, Shimizu, Shizuoka 424-8750	Phone: 0543-54-5000 Fax: 0543-54-5074 URL:http://www.hagoromofoods.co.jp/
Hoko Fishing Co., Ltd. (Brand Name: HONIHO)	1-2-4 Tsukiji, Chuo-ku, Tokyo 104-0045	Phone: 03-3542-5411 Fax: 03-5565-1860 URL: http://www.hko.co.jp/index2.html (Japanese Only)
Hotei Foods Corporation (Brand Name: HOTEI)	4-26-6 Kambara, Kambara-cho, Ihara-gun, Shizuoka 421-3203	Phone: 0543-85-3131 Fax: 0543-88-2081 URL: http://www.hoteifoods.co.jp (Japanese Only)
Inaba Foods Co., Ltd (Brand Name: INABA)	114-1 Kitada, Yui-cho, Ihara-gun, Shizuoka 421-3104	Phone: 0543-75-3111 Fax: 0543-76-1511 URL: http://www.inaba-foods.co.jp/ (Japanese Only)
Kato Sangyo Co., Ltd. (Brand Name: Kanpy)	9-20 Matsubara-cho, Nishinomiya, Hyogo 662-8543	Phone: 0798-33-7650 Fax: 0798-33-7650 URL:http://www.katosangyo.co.jp
KOKUBU & Co., Ltd. (Brand Name: K&K)	1-1-1 Nihonbashi, Chuo-ku, 103-8241	Phone: 03-3276-4131 Fax: 03-3275-0666 URL:http://www.kokubu.co.jp/
Kyokuyo Co., Ltd. (Brand Name: KYOKUYO)	Kokusai Sanno Bldg., 3-3-5 Akasaka, Minato-ku, Tokyo 107-0052	Phone: 03-5545-0701 Fax: 03-5545-0751 URL: http://www.kyokuyo.co.jp/ (Japanese Only)
Maruha Corporation (Brand Name: MARUHA)	1-1-2 Otemachi, Chiyoda-ku, Tokyo 100-0004	Phone: 03-3216-0804 Fax: 03-3216-0860 URL: http://www.maruha.co.jp/
Nakashimato Co., Ltd. (Brand Name: AOHATA)	1-4-13 Shibuya, Shibuya-ku, Tokyo 150-0002	Phone: 03-3407-7111 Fax: 03-3407-8911
Nichiro Co., Ltd. (Brand Name: AKEBONO)	1-12-1 Yurakucho, Chiyoda-ku, Tokyo 100-0006	Phone: 03-3240-6211 Fax: 03-5252-7966 URL: http://www.nichiro.co.jp/ (Japanese Only)
Nippon Suisan Kaisha Ltd. (Brand Name: NISSUI)	11F Nippon Bldg., 2-6-2 Otemachi, Chiyoda-ku, Tokyo 100-8686	Phone: 03-3244-7000 Fax: 03-3244-7426 URL: http://www.nissui.co.jp/ (Japanese Only)
Tawara Canning Co., Ltd. (Brand Name: CHOSHITA）	1982-1 Hashimoto-cho, Choshi, Chiba 288-0074	Phone: 0479-22-3755 Fax: 0479-24-3301

Reference 5．Importing companies

Name	Address	TEL / Fax
Kawasho Corporation	2-7-1 Otemachi, Chiyoda-ku, Tokyo 100-8070	Phone: 03-5203-5001 Fax: 03-5203-5290 URL: http://www.kawasho.co.jp/
Mitsubishi Corporation	2-6-3 Marunouchi, Chiyoda-ku, Tokyo 100-0005	Phone: 03-3210-2121 Fax: 03-3210-6696 URL: http://www.mitsubishi.co.jp/
Mitsui & Co., Ltd.	1-2-1 Otemachi, Chiyoda-ku, Tokyo 100-0004	Phone: 03-3285-1111 Fax: 03-3285-9829 URL: http://www.mitsui.co.jp/
Suto Canning Co., Ltd.	18-13 Chiyonodai-cho, Hakodate, Hokkaido 040-0013	Phone: 0138-51-3381 Fax: 03-3497-4141

Reference 6．Wholesale Companies

Name	Address	TEL / Fax
Itochu Shokuhin Co.	2-1-6 Koraibashi,, Ltd. Chuo-ku, Osaka 541-8578	Phone: 06-6204-5901 Fax: 06-6204-5970 URL: http://www.itochu-shokuhin.com/ (Japanese Only)
Mataichi Corporation	7F 77 Bldg, 4-14-11 Ginza, Chuo-ku, Tokyo 104-0061	Phone: 03-3542-7721 Fax: 03-3545-4709
MEIDI-YA Co., Ltd.	2-2-8 Kyobashi, Chuo-ku, Tokyo 104-0031	Phone: 03-3271-1111 Fax: 03-3278-1422 URL: http://www.meidi-ya.co.jp/ (Japanese Only)
RyoShoku Ltd.	Tokyo Ryutsu Center Bldg, 6-7F, 6-1-1 Heiwajima, Ota-ku, Tokyo 143-6556	Phone: 03-3767-5111 Fax: 03-3762-4044 URL: http://www.ryoshoku.co.jp/atop.html(Japanese Only)

Reference 7．Related shows and exhibitions

FOODEX JAPAN (Food and Beverage Exhibition)

Dates: Held annually in March for 4 days

Place: Makuhari Messe (Makuhari, Chiba)

Organizer: Japan Management Association

Contact: Management Innovation Office

Address: 3-1-22 Shibakoen, Minato-ku, Tokyo 105-8522

Phone: 03-3433-8116   Fax: 03-3434-8076 http://www.jma.or.jp/FOODEX/en/

History: Will be held for the 24th time in 2002

Japan International Seafood & Technology Expo

Dates: For 3 days, once every July

Place: Tokyo International Exhibition hall "Tokyo Big Sight"

Organizer: Japan Fisheries Association

Contact: Seafood Expo Secretariat

Sankaido Bldg, 1-9-3 Akasaka, Minato-ku, Tokyo 107-0052

Phone: 03-3585-6681 Fax: 03-3582-2337

http://www.suisankai.or.jp/

History: Will be held for the 4th time in 2002

Japan Food

Dates: Held biannually in September for 4 days (in even years)

Place: Intex Osaka, Osaka

Organizer: Osaka International Trade Fair Commission

Contact: No. 1 Secretariat

Address: 1-5-102 Nankohi, Suminoe-ku, Osaka 559-0034

Phone: 06-6612-1212 Fax: 06-6612-8585

http://www.fair.or.jp/food/

History: Will be held for the 11th time in 2002

International Food Fair (IFF) in Kitakyushu

Dates: Held biannually in October for 5 days (in even years)

Place: West Japan General Exhibition Center Annex (Fukuoka)

Organizer: Nishinippon International Trade Fair Commission

Contact: Planning section

Address:

c/o Economic Affairs Bureau, Kitakyushu City Office

1-1 Jonai, Kokurakita-ku, Kitakyushu, Fukuoka 803-8501

Phone: 093-582-4101 Fax: 093-582-3865

http://www.kix.or.jp/iff/

History: Will be held for the 11th time in 2002