20. Tuna

1. Definition of Category

The tuna discussed here is fresh, chilled or frozen. (whole tuna, meat fillets and fish meat are included, but preparations and processed tuna are excluded.)

HS Numbers	Commodity
Tuna (fresh or chilled)	
0302.31	Albacore or long-finned tuna (*Thunnus alalunga*)
0302.32	Yellow-finned tuna (*Thunnus albacares*)
0302.39-020	Big-eyed tuna
0302.39	Other
Tuna (frozen)	
0303.41	Albacore or long-finned tuna (*Thunnus alalunga*)
0303.42	Yellow-finned tuna (*Thunnus albacares*)
0303.49-020	Big-eyed tuna
0303.49	Other
Tuna (meat fillets and fish meat)	
0304.10-191, -192, -199	Tuna meat fillets (fresh and chilled)
0304.10-291, -292, -299	Tuna fish meat (fresh and chilled)
0304.20-091, -092, -094	Tuna meat fillets (frozen)
0304.90-091, -096, -099	Tuna fish meat (frozen)

Note1: The above 0304.10-199, 0304.10-299 and 0304.90-099 include fishes other than tuna.

Note2: "Meat fillet" is defined as fish meat that is cut parallel to the fish backbone with the head, entrails and fins removed.

Note 3: "Fish meat" has no bones, but it is meat other than meat fillets.

2. Import Trends

<Definition of "import">

With regard to marine products like tuna, "goods which are carried into Japan as foreign goods" are regarded as imported goods. That is, tuna which is caught by vessels of foreign nationality in the seas outside of territorial waters (including Japan's and other counties' exclusive economic zones) and carried into Japan, or tuna which is caught by vessels of Japanese nationality and first landed in other countries, and then brought into Japan. Those other than the above (i.e., tuna caught by vessels of Japanese nationality on the public seas, etc.) are regarded as Japanese products.

(1) Recent Trends in Tuna Import

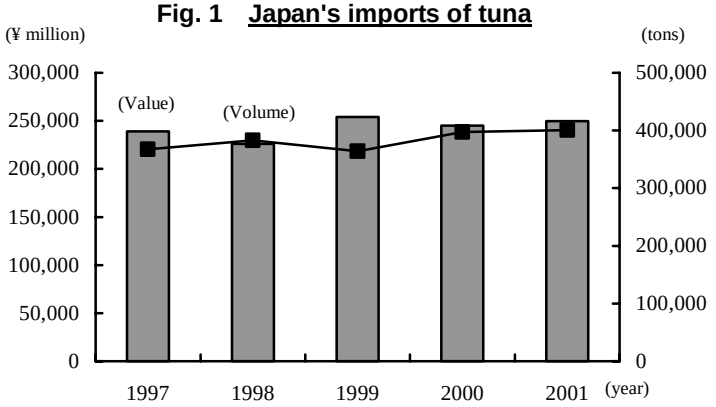
Japan is the world's largest market of raw tuna for "*sashimi*" (sliced raw fish). The seas of the world are the suppliers of raw tuna for "*sashimi*" to meet Japanese demand. As the consumption of raw tuna has been increasing in Japan, the import volume of tuna has been increasing as well. This is in order to supplement Japanese production volume. However, in recent years, it has been making stable progress. It ranges between 360,000 to 380,000 tons on the whole.

Tune import volume in 2001 reached to 400,540 tons (up 0.9% from the year before), indicating the largest volume in recent five years. On a value basis, tuna imports totaled at ¥250 billion (up 1.8%). Whole tuna (mainly without gills and entrails, called semi-dressed) covers mainstay of the total import volume. Semi-dressed tuna is said to be the best for *sashimi* as it keeps its freshness and comes mainly in the frozen form.

Looking at the import trends of whole tuna by species, growth was especially strong in imports of big-eyed tuna (140,877 tons) and yellow-finned tuna (120,445 tons), which together account for 91.0% of whole tuna import volume. Most of these species were imported frozen and used for *sashimi*.

The import volume of blue-finned tuna and southern blue-finned tuna is small but it shows promising increase. Also, the unit price per weight of these species is higher than others, partly because they are in demand as high quality fish for *sashimi*. With these higher quality species, the import volume of fresh fish is about twice as much as frozen fish. This is due to consumer taste for raw fish and the generalization of air transportation. On the other hand, import volume of albacore or long-finned tuna is quite small in Japan, and most imports are used for processed food.

Fig. 1 Japan's imports of tuna



	1997		1998		1999		2000		2001	
	Volume	Value	Volume	Value	Volume	Value	Volume	Value	Volume	Value
Tuna (fresh or chilled)	67,857	71,998	68,962	72,587	67,347	71,847	68,051	72,579	68,798	73,965
Albacore or long-finned tuna	266	138	331	189	397	235	495	247	527	329
Yellow-finned tuna	32,667	28,062	33,787	27,591	33,405	27,224	35,795	28,510	36,500	28,414
Big-eyed tuna	23,234	21,516	24,500	21,848	24,085	20,999	21,969	19,118	21,876	19,053
Other tuna	11,691	22,282	10,343	22,959	9,459	23,389	9,792	24,703	9,896	26,169
Tuna (frozen)	180,782	104,041	215,980	111,850	191,711	133,908	224,020	121,938	218,308	119,441
Albacore or long-finned tuna	1,334	322	1,622	308	1,790	358	1,474	371	4,512	1,363
Yellow-finned tuna	77,309	27,614	81,640	26,980	71,739	26,304	100,641	26,511	83,945	23,063
Big-eyed tuna	97,233	68,787	124,170	72,421	108,831	89,547	112,765	77,045	119,001	73,127
Other tuna	4,906	7,318	8,547	12,141	9,351	17,698	9,141	18,010	10,850	21,889
Tuna (meat fillets and meat)	118,639	62,870	97,956	41,779	105,000	48,250	105,020	50,612	113,434	56,235
Tuna meat fillets (fresh or chilled)	1,611	1,910	1,203	1,413	1,259	1,502	1,409	1,673	1,345	1,393
Tuna fish meat (fresh or chilled)	4,191	4,523	5,666	4,666	6,018	5,058	5,164	4,963	4,591	4,780
Tuna meat fillets (frozen)	9,744	16,412	6,797	8,659	9,256	13,949	10,930	18,942	12,872	22,790
Tuna fish meat (frozen)	103,092	40,024	84,290	27,040	88,467	27,741	87,518	25,035	94,626	27,272
TOTAL	367,278	238,908	382,897	226,214	364,058	254,003	397,091	245,127	400,540	249,640

Units :tons, ¥ million *Source: Japan Exports and Imports*

Note: "Meat fillets & fish meat" includes other fish not tunas

(2) Imports by Place of Origin

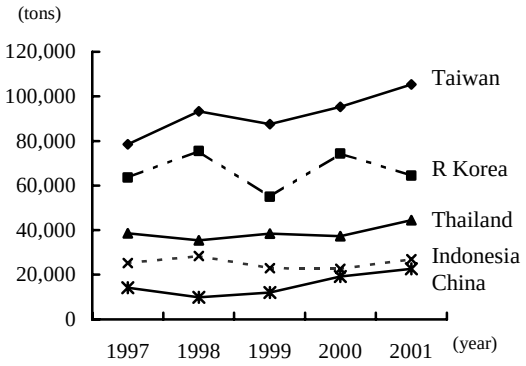
Tuna is brought into Japan, world's largest market for tuna used to make *sashimi* from all over the world. The leading overall exporter of tuna to Japan is Taiwan, which saw its exports to Japan grow by a solid 10.6% in 2001, to more than 100,000 tons (105,312 tons, import share 26.3%). The next leading exporters were the Republic of Korea (16.1%), Thailand (11.1%), Indonesia (6.7%) and China (5.6%). The Republic of Korea was the only one of these nations to suffer an import share decline.

Taiwan and the Republic of Korea possess a large fleet of super low temperature fishing vessels used for frozen tuna, equaling to a fleet of Japanese vessels. They operate full-scale fishing in the seas of the world. Therefore, the imports from these two countries are not only large in volume, but also rich in species. Most frozen tuna is imported from these two countries. Indonesia also possesses fishing vessels for frozen tuna, but they use a good deal of air-transport for fresh tuna as of late. Indonesia ranks first in the imported volume of fresh yellow-finned tuna and fresh big-eyed tuna to Japan.

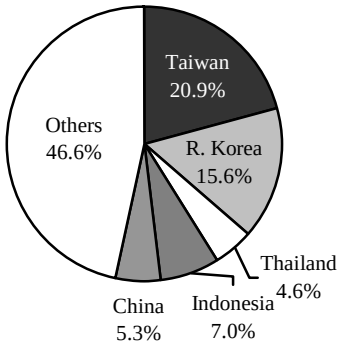
Australia, the United States and Spain tend to deal in high quality tuna, such as blue-finned tuna and southern blue-finned tuna. Regarding fresh or chilled tuna, there are quite a number of exporters in Europe, America and South Pacific countries other than those listed above. Tuna is caught in the various seas and taken to the nearest port. It is then air-transported and channeled to the Japanese market.

Fig. 2 Principal exporters of tuna to Japan

Trends in import volume by leading exporters



Shares of tuna imports in 2001 (value basis)



	1997	1998	1999	2000		2001			
	Volume	Volume	Volume	Volume	Value	Volume		Value	
Taiwan	78,457	93,322	87,487	95,250	51,124	105,312	26.3%	52,264	20.9%
R. Korea	63,481	75,551	54,878	74,404	42,989	64,369	16.1%	38,888	15.6%
Thailand	38,558	35,532	38,445	37,318	10,103	44,462	11.1%	11,567	4.6%
Indonesia	25,137	28,291	22,861	22,530	16,708	26,844	6.7%	17,509	7.0%
China	14,155	9,888	11,966	19,225	11,202	22,574	5.6%	13,109	5.3%
Others	147,490	140,315	148,421	148,364	113,001	136,980	34.2%	116,302	46.6%
TOTAL	367,278	382,897	364,058	397,091	245,127	400,540	100.0%	249,640	100.0%
(E U)	11,333	5,931	8,083	8,834	20,053	9,425	2.4%	20,154	8.1%

Units :tons, ¥ million *Source: Japan Exports and Imports*

Fig. 3 Leading exporters of tunas to Japan by category (2001)

		Total volume	First	Share	Second	Share
Fresh or chilled tune	Albacore	527	Fiji	47.4%	New Caledonia	40.8%
	Yellow-finned tuna	36,500	Indonesia	28.9%	Singapore	15.3%
	Other tuna	31,772	Indonesia	14.8%	Australia	12.2%
Frozen tuna	Albacore	4,512	R Korea	31.8%	Canada	25.5%
	Yellow-finned tuna	83,945	Taiwan	46.8%	R Korea	28.0%
	Other tuna	129,851	Taiwan	46.1%	R Korea	21.2%

Unit: tons *Source: Japan Exports and Imports*

(3) Imports' Market Share in Japan

Since the domestic catch of tuna is sluggish, the import volume has been stable through the recent decade. Subsequently, shares of imported tuna in the domestic supply increased gradually, the import volume was higher than the domestic production volume.

In the domestic production volume of tuna by species, the leading species is yellow-finned tuna, which is relatively low priced tune for *sashimi*, with 98,968 tons, followed by big-eyed tuna (87,051 tons), long-finned tuna (66,432 tons), blue-finned tuna (16,682 tons), and southern blue-finned tuna (6,331 tons). It is unique that some of domestic catch of long-finned tuna is exported abroad.

Fig. 4 Imports' share in the Japanese market

	1996	1997	1998	1999	2000
Domestic catch	281,011	338,901	298,006	329,499	286,321
Imports	377,875	367,728	382,897	364,058	397,091
Domestic market total	658,886	706,629	680,903	693,557	683,412
Imports' share	57.4%	52.0%	56.2%	52.5%	58.1%

Unit: tons
Source: Annual Statistics on Fishery and Aqua Culture Production (2000), Japan Exports and Imports

3. Key Considerations related to Importing

(1) Regulations and Procedural Requirements at the Time of Importation

Importation of tuna may be subject to control under the Foreign Exchange and Foreign Trade Law. Also, there are control of catch quantity of sea fisheries and import controls based on domestic laws. An example would be the Law for Regulation of Fishing Operation by Foreign Nationals and the Law Concerning Special Measures to Strengthen the Conservation and Management of Tuna Resources, as well as international agreements. Any species of tuna is subject to the Food Sanitation Law. Cholera inspections once were required for imported tuna from areas with cholera outbreaks, under provisions of the Quarantine Law. However, this requirement was abolished as of April 1, 2001. All tuna safety inspections now have been consolidated with inspections performed under the Food Sanitation Law.

1) Foreign Exchange and Foreign Trade Law

Under provisions of the Foreign Exchange and Foreign Trade Law, the following control is executed depending on the species and the means of transportation:

<Blue finned tuna originated in Belize, Equatorial Guinea, or Honduras and its preparations>

These are the Import Approval Items designated by the Minister of Economy, Trade and Industry ('Import Notice No. 2'). In fact, import of fresh or frozen blue-finned tuna from the above countries is prohibited, based on counsel of the International Convention for the Conservation of Atlantic Tuna (ICCAT).

<Imports of tuna (excluding long-finned tuna) by vessels, and imports of frozen blue-finned tuna and southern blue-finned tuna>

These are the Prior Confirmation Items designated by the Minister of Economy, Trade and Industry ('Import Notice No. 3') and require procedures prior to import. Procedures are to be executed by submitting an application form for confirmation to the Trade Licensing Division, Trade and Economic Cooperation Bureau, Ministry of Economy, Trade and Industry. The application form is to be prepared according to the form shown in the METI Official Bulletin.

<Fresh/frozen blue-finned tuna and southern blue-finned tuna>

These are the Customs Confirmation Items at the time of customs clearance. A certificate of statistics on blue-finned tuna or southern blue-finned tuna is to be submitted to Customs, and they are supposed to confirm the documents. The certificate is to be issued by the confirmation agency of each flag country.

Long-finned tuna and air-transported tuna (excluding blue-finned tuna) are not subject to control under the Foreign Exchange and Foreign Trade Law.

2) Food Sanitation Law Procedures

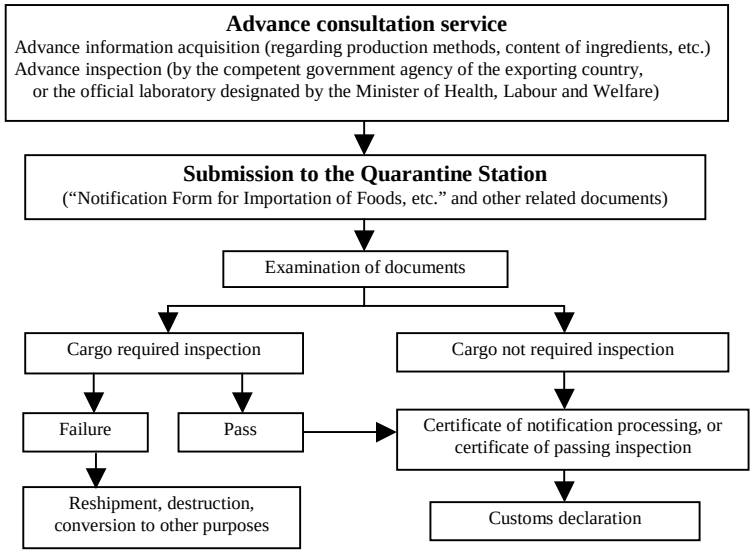
Under provisions of the Food Sanitation Law, an import notification is required for fresh, chilled or frozen tuna being imported for the purpose of sale or for other commercial purposes. Importers are required to submit the completed "Notification Form for Importation of Foods, etc." to the Quarantine Station at the port of entry. A determination is made based on the document examination whether or not an inspection at the bonded area is required.

Carbon monoxide (CO), which artificially tinges tuna with a red color in order to give it an appearance of freshness, is not designated as a usable additive in the Food Sanitation Law. Therefore, if CO is detected, import is not permitted. Frozen sliced fresh fish and shucked shellfish, including tuna, are to be inspected based on notification in accordance with the Standards of Frozen Fresh Fisheries for Raw Consumption. According to the Standards, the number of bacteria per 1 gram of the inspected item must be less than 100,000, and a group of colon bacilli must be dormant.

Prior to importing, the importer may take a sample of forthcoming imports to official laboratories designated by the Minister of Health, Labour and Welfare in Japan or in exporting countries. Those test results may be substituted for the corresponding inspection at the port of entry, which expedites the quarantine clearance process.

The Food Automated Import Inspection and Notification System (FAINS) provides computer-based import notifications. To make use of this system, importers must install FAINS software on a Windows-capable computer system, notify the Minister of Health, Labour and Welfare, and verify their passwords.

Fig. 5 Procedures required under the Food Sanitation Law



3) Other Laws

• Law for Regulation of Fishing Operation by Foreign Nationals

When foreign fishing vessels land directly in Japan with fishing products caught on the sea, permission is required by the Minister of Agriculture, Forestry and Fisheries in accordance with the Law for Regulation of Fishing Operation by Foreign Nationals. When fishing products are shipped from a foreign country and land in Japan, permission is not required. However, a certificate of shipment issued by the government agency of the shipping country must be attached.

• Law Concerning Special Measures to Strengthen the Conservation and Management of Tuna Resources

If the Government determines that tuna fishing activities by foreign fishery interests decrease the effectiveness of tuna resources conservation management, they shall be able to request that the international agency take proper measures. Also, if necessary, they shall be able to limit the import of tuna from foreign countries in accordance with the provisions of the Foreign Exchange and Foreign Trade Law.

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

Sale of fresh, chilled or frozen tuna is subject to provisions of the Food Sanitation Law, the JAS Law, the Measurement Law, the Containers and Packaging Recycling Law, and the Law for Promotion of Effective Utilization of Resources.

1) Food Sanitation Law

The Food Sanitation Law prohibits the sale of foods containing toxic or harmful substances and foods that are unsafe for human health. When selling tuna sealed in wrapping or containers, it must be labeled in accordance with provisions of the Food Sanitation Law. (see 4. Labeling)

In order to establish a store and sell fresh fisheries to consumers and retailers, they must apply for and obtain a business license. For more details on applications for licenses for selling fish, required facilities, etc. please contact the health center with jurisdiction over the intended sales area.

2) JAS Law

The JAS Law establishes quality labeling standard for all food and beverage products sold to ordinary consumers. (see 4. Labeling)

3) Measurement Law

Tuna sealed in wrapping or containers is required the labeling of the net content to certain accuracy (range of error specified by Cabinet Ordinance).

4) Containers and Packaging Recycling Law

The Containers and Packaging Recycling Law was enacted to promote recycling of container and packaging waste materials. It provides for sorting by consumers, sorted collection by municipalities, and product reuse (recycling) by product makers and distributors for glass bottles, PET bottles, paper and plastic containers and packaging. Consequently, tuna importers incur the obligation for recycling of containers and packaging (although stipulated small-scale importers are exempt). Please consult the competent government agencies listed below for more information.

5) Law for Promotion of Effective Utilization of Resources

As of April of 2001, new identifier labeling requirements apply to paper (not including beverage containers not containing aluminum) and plastic container materials, in addition to previously existing labeling requirements for steel and aluminum cans. (see 4. Labeling)

(3) Regulatory Agency Contacts

- Foreign Exchange and Foreign Trade Law
  Trade Licensing Division, Trade and Economic Cooperation Bureau, Ministry of Economy, Trade and Industry
  TEL: 03-3501-1511 http://www.meti.go.jp
- Law for Regulation of Fishing Operations by Foreign Nationals
  Resources Management Division, Resources Management Department, Fisheries Agency, Ministry of Agriculture, Forestry and Fisheries
  TEL: 03-3502-8111 http://www.maff.go.jp
- Law Concerning Special Measures to Strengthen the Conservation and Management of Tuna Resources
  Far Seas Fisheries Division, Resources Management Department, Fisheries Agency, Ministry of Agriculture, Forestry and Fisheries
  TEL: 03-3502-8111 http://www.maff.go.jp
- Food Sanitation Law
  Policy Planning Division, Department of Food Sanitation, Pharmaceutical and Medical Safety Bureau, Ministry of Health, Labour and Welfare
  TEL: 03-5253-1111 http://www.mhlw.go.jp
- JAS Law
  Standards and Labeling Division, General Food Policy Bureau, Ministry of Agriculture, Forestry and Fisheries
  TEL: 03-3502-8111 http://www.maff.go.jp
- Measurement Law
  Measurement and Intellectual Infrastructure Division, Industrial Science and Technology Policy and Environment Bureau, Ministry of Economy, Trade and Industry
  TEL: 03-3501-1511 http://www.meti.go.jp
- Containers and Packaging Recycling Law / Law for Promotion of Effective Utilization of Resources
  Recycling Promotion Division, Industrial Science and Technology Policy and Environment Bureau, Ministry of Economy, Trade and Industry
  TEL: 03-3501-1511 http://www.meti.go.jp
  Recycling Promotion Division, Waste Management and Recycling Department, Ministry of the Environment
  TEL: 03-3581-3351 http://www.env.go.jp
  Food Industry Policy Division, General Food Policy Bureau, Ministry of Agriculture, Forestry and Fisheries
  TEL: 03-3502-8111 http://www.maff.go.jp

4. Labeling

(1) Legally Required Labeling

When selling fresh, chilled or frozen tuna, required labeling items are stipulated in accordance with the Food Sanitation Law, the JAS Law, and the Measurement Law.

1) Food Sanitation Law

Tuna sealed in wrapping or containers is subject to labeling requirements of the Food Sanitation Law, requiring the following labeling items.

- Name of product
- Description of “frozen food” if it corresponds
- Whether it is for raw-eating or not
- Food additives (if it is added)

- Date of minimum durability (or best-before date)
- Preservation method
- Name and address of importer or reseller

2) JAS Law

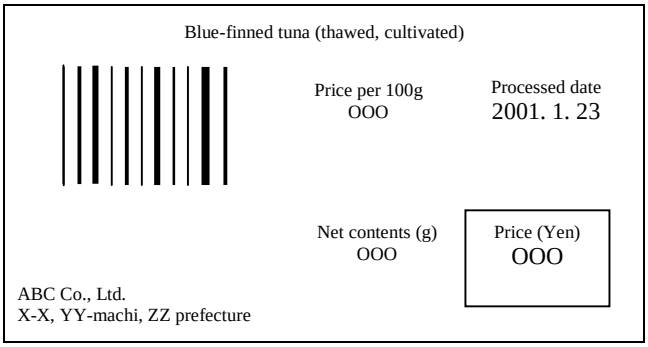
The JAS Law establishes the Fresh Food Product Quality Labeling Standards, requiring quality labeling for fresh fishery products (including chilled or frozen) sold to ordinary consumers. The Law requires to include the following labeling items, and to place labeling on the container or packaging in a readily visible location, or to display it in a readily visible location adjacent to the applicable fresh fishery products.

- Name of product
- Country of origin (names of capturing areas or processing regions for domestic products)
- Description of “thawed” if it corresponds
- Description of “cultivated” if it corresponds

3) Measurement Law

When selling fresh, chilled or frozen tuna in containers, showing content volume is required in accordance with the Measurement Law. Any error between shown content volume and actual content volume must be within the specified tolerances.

Example label of blue-finned tuna



4) Labeling under the Law for Promotion of Effective Utilization of Resources

When paper or plastic is used as a packaging material for wrapping of individual product items, or for labels, external packaging or elsewhere, a material identifier mark must be displayed with information where the material is used.

< Example >

External packaging **Individual packaging**

(2) Voluntary Labeling based on Provisions of Law

There is no voluntary labeling based on provisions of laws for tuna.

(3) Voluntary Industry Labeling

There is no voluntary industry labeling for tuna.

5. Taxes

(1) Customs Duties

Customs duties on tuna are shown as the table below. No matter what kind of tunas, tax rates are applied 3.5% for WTO member nations and 5.0% for other countries.

(2) Consumption Tax

(CIF + Customs duty) x 5%

Fig. 6 Customs duties on tuna

HS No.	Description	Rate of Duty (%)			
		General	WTO	Preferential	Temporary
0302.31	Albacore or long finned tunas (*Thunnus alalunga*)	5%	3.5%		
0302.32	Yellow fin tunas (*Thunnus albacares*)	5%	3.5%		
0302.39	Other tunas	5%	3.5%		
0303.41	Albacore or long finned tunas (*Thunnus alalunga*), frozen	5%	3.5%		
0303.42	Yellow fin tunas (*Thunnus albacares*), frozen	5%	3.5%		
0303.49	Other tunas, frozen	5%	3.5%		
0304.10	Fresh or chilled	5%	3.5%		
0304.20	Frozen fillets	5%	3.5%		
0304.90	Other, frozen	5%	3.5%		

Note : Refer to "Customs Tariff Schedules of Japan" (published by Japan Tariff Association) etc. for interpretation of tariff table.

6. Product Characteristics

The varieties of tuna are highly migratory species, and the fishing zones are quite large regardless of location. The main fishing grounds are the North Atlantic Ocean, the North Pacific Ocean, the Middle-Western Pacific Ocean, the Indian Ocean, and so on. Particularly in the Middle West Pacific Ocean, catch quantity of tuna is the largest in the world. Many coastal countries, such as Japan, the United States, the Republic of Korea, China, Taiwan, Micronesia, the Marshall Islands and Papua New Guinea operate fisheries. Tuna caught in these areas is first landed into a port of a coastal country, then some are air-transported to Japan and some are shipped to Japanese ports. This is done on a -60°C super low temperature vessel for frozen tuna.

Concerning quality, there is no detectable difference by place of origin, but it depends on the fishing zones, seasons, methods of import, condition of preservation, etc. Tuna caught in the higher latitudes is regarded as fat and high quality. For example, blue-finned tuna caught offshore of Hokkaido is said to be of the highest quality.

Tunas have different characteristics, degrees of fat, and tastes by species. Therefore, the prices depend on species, fishing zones, being fresh or frozen and so on. Fresh tuna has become more popular among consumers. The taste is not ruined by freezing and thawing, and easy maintenance of freshness for a longer period than frozen tuna is possible. So, fresh tuna is not only to the consumers' taste, but also is easy to handle for the distributors, as supply is stable currently.

1) Blue-finned tuna

It is distributed in the Northern Hemisphere and lives in the areas from the Western Pacific Ocean to the Eastern Pacific Ocean, including Japan and the Mediterranean Sea. It is the largest of the tuna species. These strong swimmers are first in long distance swimmers. For human consumption, fatty fish meat of medium quality (a part of the middle of the belly) and fatty fish meat of high quality (a part of the marbled fish meat in the belly near the head) are rich and delicious, so they are used for *sushi* and/or s*ashimi*. It is the most expensive tuna species.

2) Southern blue-finned tuna

It is distributed in sea zones lower than 30º S Lat., except during the spawning season. They live in the Pacific Ocean and the south latitude of the temperate zones of the Indian Ocean. Appearance, quality of fish meat, and taste are similar to blue-finned tuna, but it is smaller than blue-finned tuna. It is mainly used for *sushi* and/or *sashimi* like blue-finned tuna. It is the next most expensive tuna.

3) Big-eyed tuna

It is widely distributed in areas from the tropics to the temperate zones, excluding the Mediterranean Sea. It seasonally migrates between the north and south, seeking places for food and spawning. It is called "big-eyed" because of its large eyes. It is smaller than blue-finned tuna. It lives in rather deep parts of the central areas of the ocean. Catch quantity is the largest of tuna species. Its fish meat is deep red and the taste is rich, but a little peculiar. However, because it is more abundant and cheaper than blue-finned tuna and fatty fish meat can be obtained, it is mainly used for semi-high quality *sushi* and/or *sashimi*.

4) Yellow-finned tuna

It is widely distributed in areas from the tropics to the temperate zones, excluding the Mediterranean Sea. Around Japan, it lives in the south of Hokkaido and lower latitude areas. It is called "yellow-finned" because its fins and the sides of its body are a yellowish color. Catch quantity is second to big-eyed tuna. Its fish meat is pink and the taste is rather plain. Because the price is reasonable, this is widely consumed as foodstuff for general household use. This is used for canned food and fish meat sausage, as well as *sashimi*.

5) Albacore or long-finned tuna

It is distributed in the outer sea zones from 40º N Lat. to 40º S Lat. It is the smallest species. It is a highly migratory species, moving between the east and west. Its fish meat is not red, but rather a milky white, and the taste is plain. Because it easily crumbles, it is mainly used for canned and frozen food, and is not suitable for *sushi* and/or *sashimi*.

7. Domestic Distribution System and Business Practices

(1) Domestic Market Conditions

<World's largest tuna market>

The seas of the world are the suppliers of tuna for *sashimi* to meet Japanese demand. Japan is the world's largest tuna market. The largest market of tuna for canned food is the USA. However, because the dealing price of tuna for *sashimi* is said to be 20 to 30 times as much as that of tuna for canned food, tuna that seems to be used for s*ashimi* is primarily brought into Japan. Under current conditions, the supply of tuna on the Japanese market has been exceeding demand.

After the distribution of imported tuna expanded, its retail price became reasonable, except certain species, and tuna is consumed daily in familiar foods like *sashimi* without the strong image of high quality food. According to the Annual Report on the Family Income and Expenditure Survey (2000), the household consumption of fresh fisheries over a year decreased from 50.7 kg to 38.7 kg compared with 1977. On the other hand, consumption of tuna increased from 3.3 kg to 3.4 kg. Apart from household consumption, demand is great in the restaurant industry. The consumption ratio of fresh tuna is especially high in this area because of successful *sushi* restaurants with revolving systems serving high quality fisheries.

<Necessity for international fishing resources management>

Concerning tuna, popular high quality species from which fatty fish meat can be obtained need the fisheries control from a resources conservation point of view. This is because resource quantities of those species are declining. However, because tuna have no borders, it is difficult to manage it by one nation. So, international agencies execute conservation management measures, such as a permission system for the operation of fisheries, catch quantity controls, fishing quotas by a country, etc. (for more detailed information regarding the international management for tuna resources, see the Appendix in this report)

<Government measures>

The Japanese government takes the following action for tuna fisheries in order to meet the catch quantity control, etc. designated by international treaties: First, tuna fisheries are designated fisheries in accordance with the Fisheries Act, Article 52, Clause 1 from the fisheries control and resources conservation point of view. Therefore, it is impossible to operate tuna fisheries without approval. Also, a fishing vessel must submit a fishing report on catch quantity, etc., to the Fisheries Agency after the operation. In the specified fishing zone, a fishing vessel is required to submit the report even during the operation.

To outline the discipline of vessels with a flag of convenience that operate fisheries ignoring the resources conservation management or fishing vessels that are a nonmember of international fisheries control agencies, the 'Ministerial Ordinance for the Permission and Regulation of Designated Fisheries' was enacted in Japan in 1998. If Japanese personnel are on board a vessel operating fishing without permission in the sea zones designated to obtain permission by the Minister of Agriculture, Forestry and fisheries, disciplinary action is to be taken. In addition, Japan, as the world's largest tuna consumption country, takes action towards the countries involved, such as establishing management agencies in the sea zones where no international control is executed, and shows an attitude of providing resource management willingly. It is plainly expressed in the Law Concerning Special Measures to Strengthen the Conservation and Management of Tuna Resources.

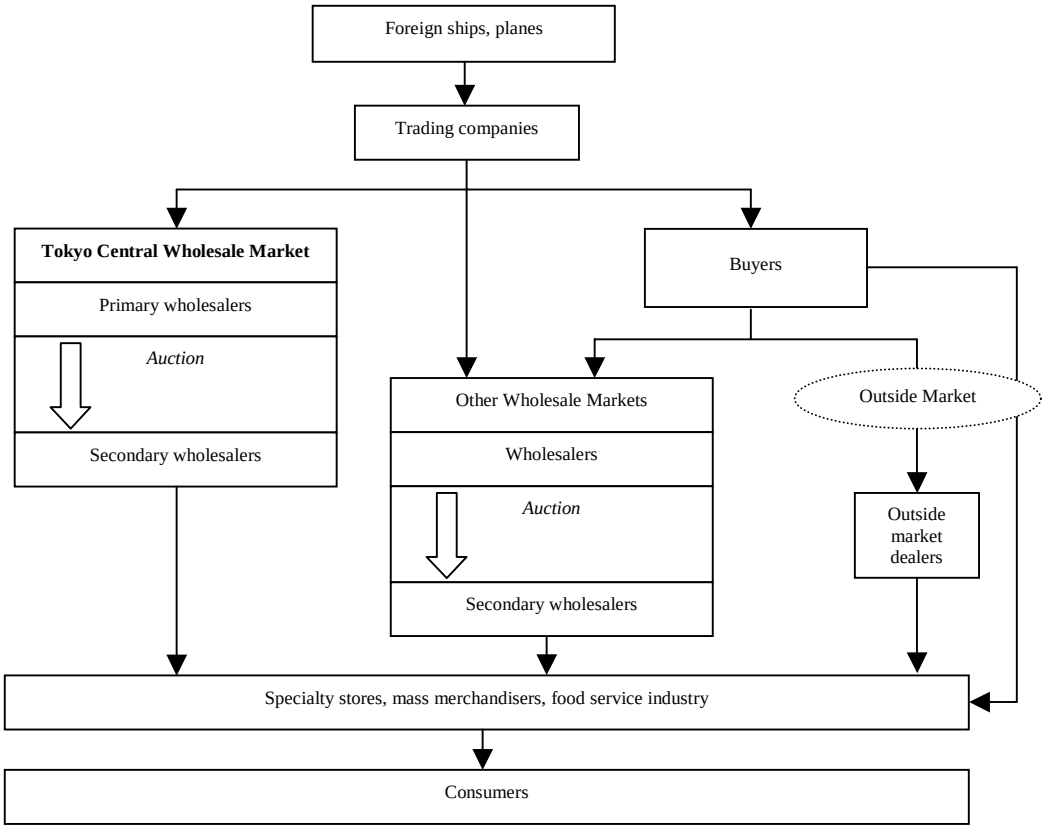
<Attempt of aquaculture and propagation>

In order to decrease the risk of catch quantity fluctuation and to establish a stable supply, the leading trading companies, fisheries, and the leading distributors pared up with trading companies to increase the handling quantity of aqua cultured tuna. Aquaculture is a method to catch tuna with little fat after spawning or raising tuna to medium size, and feeding them in a fish preserve in order to put on fat and increase the value, and then to distribute them. They are comparatively stable in quality, reasonable in price, and provide a year-round supply. Southern blue-finned tuna of Australia, and blue-finned tuna of Croatia and Spain are typical aqua cultured tuna. There is an attempt of propagation by seedlings other than aquaculture, but there are many problems and, it has not realized a practical stage.

(2) Distribution Channels

Main import and distribution channels of fresh, chilled or frozen tuna are as shown in the following Fig. 8. Distribution systems bypassing the wholesale market can be seen in recent years, however, if so, the selling prices depend on the auction prices of the wholesale market in many cases. It may also be the case that importers/trading companies are involved in purchasing and wholesaling tuna. Concerning the fishing vessels for frozen tuna, the leading trading companies' purchase of all tuna on a vessel, which is called "one whole vessel purchase," is popular. Air-transport dealers are various. There are small-scale business operators as well as big businesses with great capital.

Fig. 7 Imported tuna distribution channels



(3) Key Considerations for entering the Japanese Market

A considerably wide range of product knowledge is required. Some tuna species are prohibited for import, and some are subject to a quarantine inspection. Therefore, dealers must be aware of laws and regulations. Also, there are the following problems regarding import and distribution of tuna:

- A considerably wide range of product knowledge is required to select the species and assure quality.
- Long-term experience with market prices and procedures is required for purchase.
- To obtain reliable suppliers is essential, because with fresh fish, it is difficult to maintain a stable supply.

- Regarding the purchase of frozen tuna imported by vessels, leading trading companies' "one whole vessel purchase" is currently preferable, and to purchase only needed species and quantities is seldom practiced.
- When entering the wholesale market, frozen tuna requires a considerable investment for preservation facilities. As for fresh tuna, to secure sales outlets as well as to deal with transportation expertise proves to be the big issues. Fresh tuna must be purchased and distributed before it loses its freshness.
- It takes many years to establish relations between suppliers and buyers. Therefore, there are many problems for a newcomer breaking into the market.
- If involved in selling tuna, necessary know-how and facilities are required to process tuna for sale.

8. After-Sales Service

There is no particular after-sales service for tuna. In the event, retail store and distributor are addressing the problem.

9. Related Product Categories

Processed tuna (like canned food), and fresh fisheries other than tuna are listed as related product categories. Processed tuna is subject to provisions of the Food Sanitation Law and the Measurement Law. With regard to fisheries other than tuna, certain items, such as fish caught in coastal waters, scallops, eye of scallops, and squid are Import Quota Items subject to the Foreign Exchange and Foreign Trade Law. Whales are items under the control of international trade in accordance with the Washington Convention (Convention on International Trade in Endangered Species of Fauna and Flora, so called CITES). However, Japan takes exception to whale with regard to the Washington Convention. Japan defines whale and its preparation as Prior Confirmation Items (items whose place of origin and/or shipping area is of a non-member nation of the International Convention for Regulation of Whaling are defined as the Import Approval Items) in accordance with the Foreign Exchange and Foreign Trade Law.

10. Direct Imports by Individuals

Imports of tuna must be done very carefully because it is difficult to prove quality. It costs a lot for transportation, which can maintain freshness, even if tunas are purchased from reliable suppliers. With import for personal consumption, there is no regulation by the Food Sanitation Law.

11. Related Organizations

- Japan Marine Products Importers Association
  TEL: 03-5280-2891
- Federation of Japan Tuna Fisheries Co-operative Associations
  TEL: 03-3264-6161 http://www2.convention.co.jp/maguro

12. Appendix : International Management for Tuna Resources

Tuna Resources Management is executed on a global scale as follows:

1) The United Nations Convention on the Law of the Sea (UNCLOS) (1994)
   Stipulating that each member nation is to cooperate for the tuna resources management through regional agencies.

2) Agreement to Promote Compliance with International Conservation and Management Measures by Fishing Vessels on the High Seas, the Food and Agriculture Organization of the United Nations (FAO)
   Stipulating that tuna fisheries are under the permit system, and permitted fishing vessels are to be registered with FAO. (Adopted the action plan to reduce the fishing capability of long line fishery by 20 to 30%, until at least the end of 1999, by talks between the governments in October, 1998)

3) Agreement for the Implementation of the Provisions of the United Nations Convention on the Law of the Sea of 10 December 1982 Relating to the Conservation and Management of Straddling Fish Stocks and Highly Migratory Fish Stocks' (1995)

Stipulating that unless becoming an official member of management agencies or executing the obligation to cooperate even if not becoming an official member, tuna fisheries in the high seas are prohibited. A flag country is to be able to issue an operation permit only when they can effectively control tuna fisheries.

4) Regional Agreements on Tuna

International Convention for the Conservation of Atlantic Tunas (ICCAT)

The whole Atlantic Ocean, including the Mediterranean Sea, is subject to the above. The number of member nations is 23, including Japan, the USA, Canada, Korea and Spain. These countries are NOT to import tuna from nonmember nations who practice indiscriminate fishing according to the counsel of ICCAT. Control of the lightest weight limitation for yellow fin tuna, big-eyed tuna, blue fin tuna, etc. is executed as well.

Inter-American Tropical Tuna Commission (IATTC)

The Eastern Pacific Ocean is subject to the above. The number of member nations is 8, including Japan, the USA and Venezuela. There is control of total catch quantity within specified areas as the main conservation management measures.

Convention for the Conservation of Southern Blue fin Tuna (CCSBT)

All migratory sea zones (the high latitude zones of the Southern Hemisphere) are subject to the above. The number of member nations is 3: Japan, Australia and New Zealand. The total catch quantity and quota by county of southern blue fin tuna are determined in every year's conference.

Indian Ocean Commission (IOTC)

The Indian Ocean is subject to the above. The number of member nations is 11, including Japan, Sri Lanka and Korea. It was established in 1996, and has been upgrading the foundation, such as setting up the organization.