



Pacific bluefin tuna farm at Kinki University's Fisheries Laboratory

Tuna market in Japan: challenges and prospects

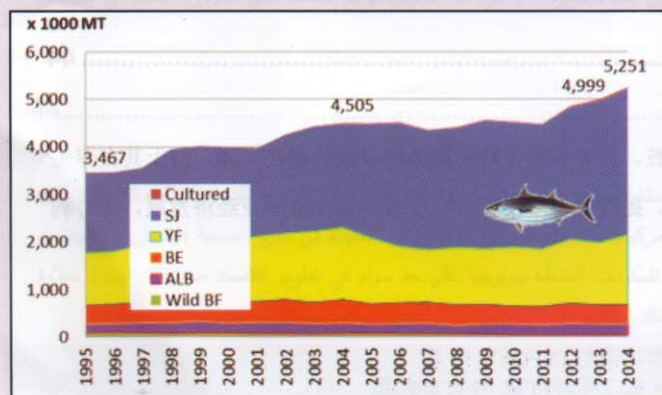
by Taro Kawamoto

The author presents a comprehensive and updated overview of the tuna supply and consumption patterns in the Japanese market, including developing trends in the marketing of tuna products.

Global supply and demand

In 2014, global production of the main tuna species Pacific bluefin, Atlantic bluefin, Southern bluefin, bigeye, yellowfin, albacore, and skipjack (not including other tunas and tuna-like species), totaled almost 5.3 million tonnes (Figure 1). This steep rise of about 1.5 times as compared to 3.5 million tonnes in 1995 was attributed primarily to the increase in purse seine catches in the tropical Western and Central Pacific Ocean (WCPO).

Fig. 1: Global production of main tuna species (BF, BE, YF, ALB and SJ)



Source: FAO FishStatJ

Global consumption of tunas in 2013 is estimated at 5.2 million tonnes (round-fish-base). The EU accounted for 1.3 million tonnes (30%), Japan 750 000 tonnes (14%), North America 580 000 tonnes (11%), South America 590 000 tonnes (11%), and the Middle East 380 000 tonnes (7%). Approximately 1.1 million tonnes (21%) of unknown tuna products, including canned tuna and sashimi tuna, may have been consumed in Asian countries other than Japan. Hence Japan still maintained its position as the single largest tuna consuming country in the world.

Supply and consumption patterns in Japan

In 2014, the longline, pole and line, purse seine and farming industries in Japan provided 460 000 tonnes of tunas, together with 272 000 tonnes of imports for the domestic market. Meanwhile, new breeding technologies for Pacific bluefin tuna have been successful, contributing to more sustainable use of wild resources.

At the same time, about 64 000 tonnes of tuna were exported to overseas markets such as Thailand. Consequently, a total of 668 000 tonnes of tuna reached the Japanese market, to be processed as canned tuna, sashimi tuna and *katsuo* products. These supplies were distributed by specialised channels, including local fish markets at landing ports, tuna buyers and central wholesale markets such as Tsukiji.

Domestic consumption in that year was an estimated 751 000 tonnes of tuna, consisting of three main products, namely canned tuna (15%), *katsuobushi*/dried bonito (23%), and sashimi tuna (62%), including imported products (see Figure 2).

Fig 2: Three of the most popular tuna products in Japan



Table 1 shows the estimated tuna supplies and consumption by species in 2014. Approximately 464 000 tonnes of tunas were consumed as sashimi tuna, 173 000 tonnes as *katsuobushi* and 114 000 tonnes as canned tuna in 2014.

In terms of species, bluefin/Southern bluefin and bigeye tuna were mostly consumed as sashimi tuna while the bulk of the skipjack and yellowfin were consumed as canned tuna and *katsuobushi*.

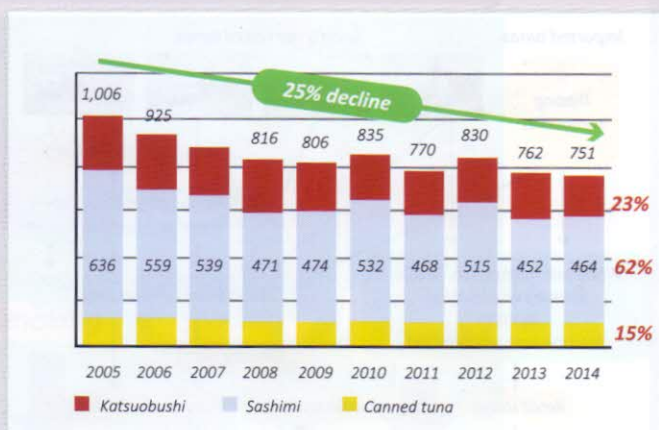
Table 1: Estimated tuna supplies and consumption by species in Japan, 2014

	Species	Round-fish base					Total
		SJ	ALB	YF	BE	BF/SBF	
Supply	Local catch (a)	256	62	58	55	15	445
	Cultured (b)					15	15
	Import (c)	42	16	51	127	37	272
	Export (d)	35	19	5	4	1	64
	Total (a+b+c-d)	262	59	104	178	65	668
Consumption	Canned tuna	40	0	74	0	0	114
	Sashimi	95	59	67	178	65	464
	<i>Katsuobushi</i>	173	0	0	0	0	173
	Total	308	59	141	178	65	751

Source: Annual Fisheries statistics, Ministry of Agriculture, Forestry and Fisheries; Japan trade statistics: Ministry of Finance; Fisheries Agency of Japan; Japan Canners Association.

However, it must also be noted that consumption per capita of tuna in Japan has actually dropped by about 25% since 2005 (Figure 3).

Fig. 3: Decreasing tuna market size in Japan, 2005 - 2014



Source: Japan trade statistics: Ministry of Finance; Japan Fisheries Information Service Center; Japan Canners Association; Annual fisheries statistics, Distribution statistics: Ministry of Agriculture, Forestry and Fisheries, Japan; Mitsubishi Corporation.

Sashimi

Tuna used for sashimi originates from the domestic fisheries industry, namely longline, pole-and-line, purse seine, and farming, together with imported tunas from all over the world. Most of the locally harvested tunas are unloaded in fish markets at landing ports such as Yaizu and are sold by auction as well as through negotiations with tuna buyers. The raw fish is processed into several kinds of sashimi products, such as loins, blocks, steaks, *negitoro* (minced tuna) and *tataki*.

A portion of the domestic supplies (chilled) is brought together with imported tuna to central wholesale markets such as Tsukiji where they are sold by auction. Frozen tuna on the other hand, tend to be directly distributed by buyers

