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SURIMI SUPPLY, DEMAND, AND MARKET OF JAPAN

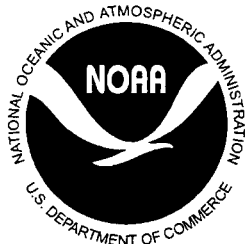
Sunee C. Sonu

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U.S. DEPARTMENT OF COMMERCE
National Oceanic and Atmospheric Administration
National Marine Fisheries Service
Southwest Region

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EXECUTIVE SUMMARY

Japan is the world's largest market for surimi, utilizing an average of 413,000 metric tons (mt) during 1990-2001. Supply for this market comes from both domestic production and imports. The share of the Japanese surimi market supplied by imports increased from 43 percent in 1992 to 61 percent in 2001.

Japan's surimi production increased rapidly from 43,000 mt in 1966 to 423,000 mt in 1973 and reached a record of 424,000 mt in 1976. Since 1977, however, surimi production has steadily declined, and the production in 2001 of 110,000 mt was less than 26 percent of the record production, and was the lowest production in 34 years.

Japan is a major importer of frozen surimi. In 2001, Japan's imports of frozen surimi were worth over \$571 million. Frozen Alaska pollock surimi was the dominant product imported into Japan, representing 46 percent in volume and 41 percent in value in 2001. Japanese imports of frozen Alaska pollock surimi came mostly from the United States.

Imports of frozen cod and Pacific whiting surimi, mostly surimi made from Pacific whiting, fluctuated between 17,000 and 26,000 mt from 1995 to 2000. The United States has consistently been the leading supplier of frozen Pacific whiting surimi to Japan, providing over 94 percent of the total.

Prices of surimi are primarily determined by supply and demand, but quality, origin, and species are also important. Wholesale prices for frozen surimi generally fall during summer. In 2002, however, summer prices did not decline, due to reduced imports and low levels of inventory of frozen surimi. Average wholesale prices of frozen surimi in June 2002 were up 8-19 percent from prices for December 2001 and 4-15 percent higher than prices for the same period in 2001. Japanese imports of Alaska pollock surimi decreased from 10,663 mt in June 2001 to 1,371 mt in June 2002.

Japan regulates imports of surimi with import quota (IQ) and tariffs. To meet strong demand, the Japanese government increased the IQ for Alaska pollock surimi from 19,000 mt for 1986 to 140,000 mt for 1990, and then to 205,400 mt for 2002. As the United States and Japan are signatories to the World Trade Organization (WTO), WTO tariffs apply to U.S. exports of frozen surimi and frozen fish meat: 4.2 percent for frozen surimi and frozen fish meat of cod, pollack, hake; and 3.5 percent for frozen surimi of threadfin bream.

INTRODUCTION

Surimi, a refined form of minced fish meat, is the raw material used in making a wide range of finished products such as imitation crab meat, chikuwa (broiled surimi product), satuma-age (fried), itatsuki kamaboko (steamed), fish hams, fish sausages, and other seafood analogs (Sonu 1986).

Although the technique for making surimi has been practiced in Japan for many centuries, only during the past 40 years has the tradition evolved into a major industrial operation.

Before 1960, freeze denaturation of protein was a poorly understood phenomenon. When a protein becomes denatured, it loses its native structure and its ability to perform certain biochemical functions such as forming a gel, an important property in surimi.

A new technology for processing Alaska pollock into a stable frozen surimi, which is protected from freeze denaturation, was developed in the early 1960s in Japan. It allowed surimi manufacturing to evolve into an automated mass-production system to keep pace with expanding demand. Automation of surimi manufacturing procedures was essentially completed both on board and on shore within about 10 years following the introduction of frozen surimi.

Alaska pollock, *Theragra chalcogrammus*, is the most widely utilized species in the Japanese surimi industry because of its abundance, good gel-forming capability, year-round availability, white flesh, and reasonable price.

Japan was once the world's largest producer of surimi. Recently, however, the Japanese production of surimi has dropped significantly due mainly to shortage of supply of fish from domestic and foreign waters, and Japan has become increasingly more dependent on imports for its supply. This need is likely to remain because increased catches of fish in foreign waters by the Japanese fleet are not likely in the near future.

Japan is the major user of surimi and the most important export market for U.S. surimi, accounting for 51 percent of U.S. exports of surimi in 2001.

This report provides a detailed examination of the Japanese surimi production as well as its imports, exports, supply, demand, and market, in order to identify potential opportunities for export by U.S. surimi producers.

SURIMI PRODUCTION

The history of frozen surimi production in Japan from 1960 to 2001 is illustrated in Figure 1 and Table 1. Surimi production increased rapidly during the 6-year period between 1967 and 1973. This trend was facilitated by the advent of automated facilities for surimi production and by the introduction of factoryship operations. By 1973, total annual output of surimi rose to 423,000 mt, more than five times the 1967 production. From 1974 to 1984, the production of surimi hovered around 350,000 to 420,000 mt per year. From 1985 to the present, the production has steadily declined due mainly to shortage of supply of fish in domestic and foreign waters. The production was 413,000 mt in 1985 but only 110,000 mt in 2001.

Most of the Japanese on-shore surimi processing industry is located on Hokkaido Island, where domestic landings of Alaska pollock and Atka mackerel, the two major species used as raw material, take place. Of the 106,000 mt of land-processed frozen surimi processed in 2001, it is estimated that 73,000 mt were made from Alaska pollock, 21,000 mt from Atka mackerel, 3,000 mt from Japanese sardine and Pacific mackerel and 10,000 mt from other species.

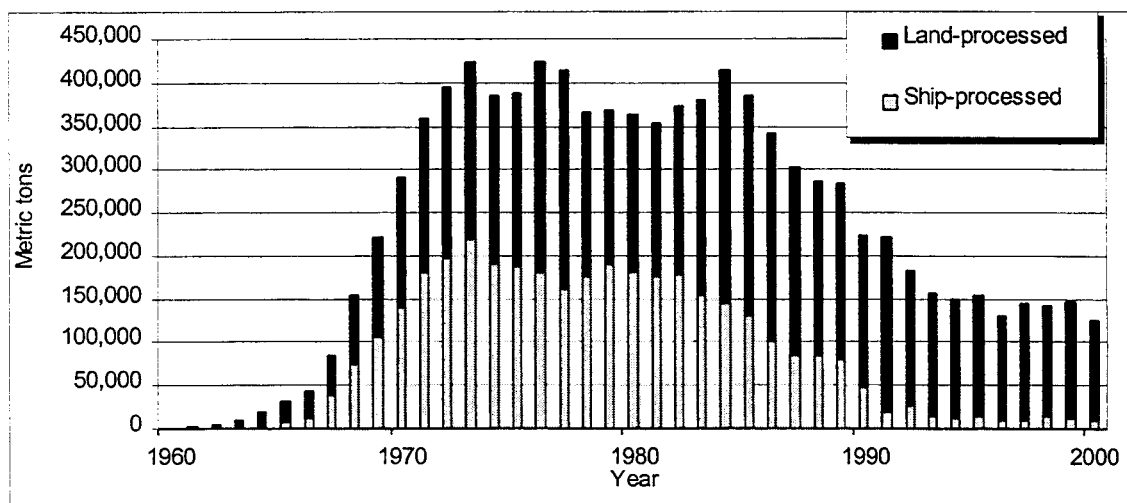


Figure 1. Japanese surimi production, 1960-2001 (metric tons).

Sources: Japan Surimi Association 1984
Ministry of Agriculture, Forestry, & Fisheries
1974-2002
Suisan Tsushin Sha 2001
Minato Shinbun Sha 2002
Hokkai Keizai Shinbun Sha 2002

**Table 1. Japan's frozen surimi production, 1960-2001
(metric tons).**

Year	Land-processed surimi					Ship-processed surimi	Total
	Alaska Pollock	Sardine/mackerel	Atka mackerel	Other fish	Sub-Total		
1960	-*	-	-	-	250	0	250
1961	-	-	-	-	2,500	0	2,500
1962	-	-	-	-	4,500	0	4,500
1963	-	-	-	-	9,282	0	9,282
1964	-	-	-	-	18,060	0	18,060
1965	-	-	-	-	23,639	8,184	31,823
1966	-	-	-	-	29,913	13,034	42,947
1967	-	-	-	-	44,869	39,283	84,152
1968	61,355	-	-	16,962	78,317	75,525	153,842
1969	99,140	-	-	15,955	115,095	105,297	220,392
1970	134,834	-	-	18,457	153,292	138,743	292,035
1971	165,895	-	-	13,264	179,159	180,138	359,297
1972	180,223	-	-	18,685	198,909	196,131	395,040
1973	190,555	-	4,697	9,938	205,191	217,891	423,082
1974	173,765	-	11,638	8,339	193,744	190,556	384,300
1975	193,978	-	2,908	3,569	200,455	187,228	387,683
1976	233,406	-	6,361	3,223	242,990	181,243	424,233
1977	234,269	-	13,044	4,338	251,651	161,798	413,449
1978	177,655	-	5,669	6,406	189,730	175,853	365,583
1979	162,422	-	7,459	7,084	176,965	190,621	367,586
1980	165,818	-	10,353	8,744	184,915	179,331	364,246
1981	160,200	-	-	18,280	178,480	176,442	354,922
1982	178,941	-	-	17,013	195,954	177,095	373,049
1983	210,855	3,914	3,141	8,370	226,280	153,593	379,873
1984	248,186	5,463	3,975	11,300	268,924	144,440	413,364
1985	230,036	5,599	3,540	15,115	254,290	130,588	384,878
1986	205,074	5,481	4,451	25,773	240,779	101,053	341,832
1987	195,921	5,260	2,464	16,682	220,327	83,844	304,171
1988	177,887	4,471	5,286	14,434	202,078	85,328	287,406
1989	180,305	3,215	5,973	13,435	202,928	80,415	283,343
1990	147,817	4,156	13,453	10,557	175,983	47,962	223,945
1991	154,653	3,957	19,282	23,435	201,327	18,959	220,286
1992	130,797	3,813	9,276	14,092	157,978	25,450	183,428
1993	108,528	3,496	13,734	15,251	141,009	14,812	155,821
1994	103,336	7,592	12,237	15,107	138,272	11,032	149,304
1995	95,238	5,027	22,363	18,121	140,749	13,805	154,554
1996	69,553	6,067	29,825	13,833	119,278	9,808	129,086
1997	83,152	5,260	28,417	16,580	133,409	10,214	143,623
1998	84,196	4,331	26,775	11,784	127,086	14,730	141,816
1999	97,413	3,373	23,809	9,968	134,563	11,373	145,936
2000	84,508	1,747	20,195	9,929	116,379	8,783	125,162
2001	73,259	2,845	20,632	9,745	106,481	4,000	110,481

-*.....not available Sub-total may not add due to rounding

Sources: Japan Surimi Association 1984
Ministry of Agriculture, Forestry, & Fisheries 1974-2002
Suisan Tsushin Sha 2001
Minato Shinbun Sha 2002
Hokkai Keizai Shinbun Sha 2002

ALASKA POLLOCK

Alaska pollock, *Theragra chalcogrammus*, is the most widely utilized species in the Japanese surimi industry. Though almost any fish can be used to make surimi, no other species can match the combination of its abundance, good gel-forming capability, year-round availability, white flesh, and reasonable price (Sonu 1986).

Alaska pollock is widely distributed in the North Pacific, from Central California into the eastern Bering Sea, along the Aleutian arc, around Kamchatka, in the Okhotsk Sea and into the southern Sea of Japan (Cohen et al. 1990).

World catch of Alaska pollock

Alaska pollock constitute one of the world's major fishery resources (Table 2). Total world catches of Alaska pollock ranged between 3.3 and 4.8 million mt annually in recent years. Alaska pollock are caught exclusively in the North Pacific (Table 3). Approximately two-thirds of the catch was taken in the Northwest Pacific in an area west of 175° which includes the coastal and offshore areas of Japan, the Republic of Korea, and Russia. The remaining one-third came from the U.S. Exclusive Economic Zone (EEZ) in the Northeast Pacific.

The development of Alaska pollock fisheries was stimulated in the early 1960s by successful implementation by Japan of mechanized processing of Alaska pollock into frozen surimi. By 1972, the fishery had expanded throughout the North Pacific, mostly by Japan and to a lesser extent by the former Soviet Union and the Republic of Korea. The combined harvests of Alaska pollock by these three countries increased ninefold, from 464,000 mt in 1961 to 4.2 million mt in 1972 (Figure 2).

Total world harvest of Alaska pollock reached a peak of 6.76 million mt in 1986 but have been on a downward trend since then, falling to 3.36 million mt in 1999 (Figure 2). The decrease in global landings of Alaska pollock was due mainly to sharply declined catches by Russia and Japan. Combined landings by these two countries declined from 5.01 million mt in 1986 to 1.88 million mt in 1999.

Of nine nations that reported Alaska pollock landings in 1999, Russia ranked highest with 45 percent of the total (Table 3). The United States was second with 31 percent, while Japan, the world's largest producer during 1951-1976, was in third place. Japan's share of the world catch decreased sharply from over 83 percent during the 1950s to 11 percent in 1999. China and the Republic of Korea respectively harvested 5 and 4 percent of the world total. The combined catch of other countries

including Taiwan, the Democratic People's Republic of Korea, Poland, and Canada accounted for under 4 percent of the total catch.

Russian annual harvest of Alaska pollock reached a high in 1986 at 3.58 million mt annually, but has since declined sharply (FAO 1988). The catch in 1999 of 1.5 million mt was about 42 percent of the record landings, and was the lowest catch in 26 year. The Total Allowable Catch (TAC) for Alaska pollock in the Russian Exclusive Economic Zone was reduced by 45 percent from 1,678,000 in 2000 to 929,600 mt in 2002 to protect the population (Hokkai Keizai Shinbun Sha 2002).

The U.S. fishing industry initially embarked on an exploratory Alaska pollock fishing venture in 1974 (Koslow 1976). The industry was stimulated by a strong domestic demand for Alaska pollock as an acceptable substitute for Atlantic cod (*Gadus morhua*) for breaded fish products. The Alaska pollock fishing operation, however, remained at a small scale, until the late-1980s (Figure 2).

Foreign access to U.S. waters was restricted following the establishment of the U.S. EEZ in 1977. The U.S. commercial fishery for Alaska pollock experienced a short period of joint venture operations in the mid-1980s and was fully a U.S. fishery by 1988, when foreign fishing was phased out. To fill the strong demand for surimi, the U.S. fishery expanded each year and the harvests of Alaska pollock continued to increase, reaching a peak in 1990 at 1.41 million mt. Catches have since remained relatively stable and averaged about 1.25 million mt during the period 1991-2000 (Figure 2).

**Table 2. World landings of principal species, 1994-1999
(1,000 metric tons).**

Species	1994	1995	1996	1997	1998	1999
Peruvian anchovy	12,521	8,645	8,864	7,685	1,729	8,723
Alaska pollock	4,375	4,809	4,549	4,487	4,049	3,362
Atlantic herring	1,930	2,353	2,329	2,534	2,422	2,404
Skipjack tuna	1,498	1,655	1,584	1,613	1,884	1,976
Chub mackerel	1,531	1,575	2,178	2,427	1,924	1,955
Japanese anchovy	821	972	1,254	1,667	2,094	1,820
Chilean						
jack mackerel	4,262	4,955	4,379	3,597	2,026	1,423
Largehead hairtail	1,081	1,244	1,283	1,206	1,435	1,419
Blue whiting	495	544	631	712	1,185	1,323
Yellowfin tuna	1,107	1,115	1,083	1,213	1,252	1,258
Atlantic cod	1,249	1,271	1,341	1,375	1,213	1,093
Argentina						
shortfin squid	506	521	656	980	665	1,091
Capelin	884	749	1,527	1,605	985	905
European pilchard	1,167	1,209	996	999	941	901
Araucanian herring	341	127	447	441	318	782
Gulf menhaden	767	472	492	598	497	694
European sprat	580	602	672	700	696	684
Atlantic mackerel	857	794	560	559	668	611
Akiami paste shrimp	345	406	461	496	587	599
European anchovy	523	619	528	501	499	598
Japanese						
Spanish mackerel	228	259	301	366	552	595
Japanese sardine	1,314	733	431	418	296	515
Japanese flying squid	504	513	716	603	379	498

Sources: FAO 1999, 2001

Table 3. World landings of Alaska Pollock by FAO fishing area and country, 1993-1999 (1,000 metric tons).

FAO fishing area/ Country	1993	1994	1995	1996	1997	1998	1999
Pacific ocean:							
Northwest:							
China	135	130	189	167	258	141	117
China, Taiwan	0*	0	0	0	0	0	0
Japan	382	379	339	331	339	316	382
Korea, D.P. Rp.	...**	75	120	15	67	60	55
Korea, Rep.	181	297	335	224	223	236	146
Poland	235	270	249	116	125	82	66
Russian Fed.	2,114	1,747	2,208	2,440	2,253	1,931	1,500
Area total	3,048	2,898	3,441	3,294	3,265	2,766	2,266
Pacific ocean:							
Northeast:							
Canada	8	5	3	2	2	1	1
China	40	40	60	60	80	50	40
Japan	0	0	-	-	-	-	-
Korea, Rep.	45	15	11	2	-	-	-
Russian Fed.	-***	-	-	0	-	-	-
U.S.A.	1,478	1,417	1,294	1,190	1,140	1,232	1,055
Area total	1,571	1,477	1,368	1,255	1,221	1,283	1,096
Species total	4,619	4,375	4,809	4,549	4,487	4,049	3,362

0* More than zero but less than 500 metric tons

...** Data not available

-*** Magnitude known to be nil or zero

Total may not add due to rounding

Source: FAO 2001

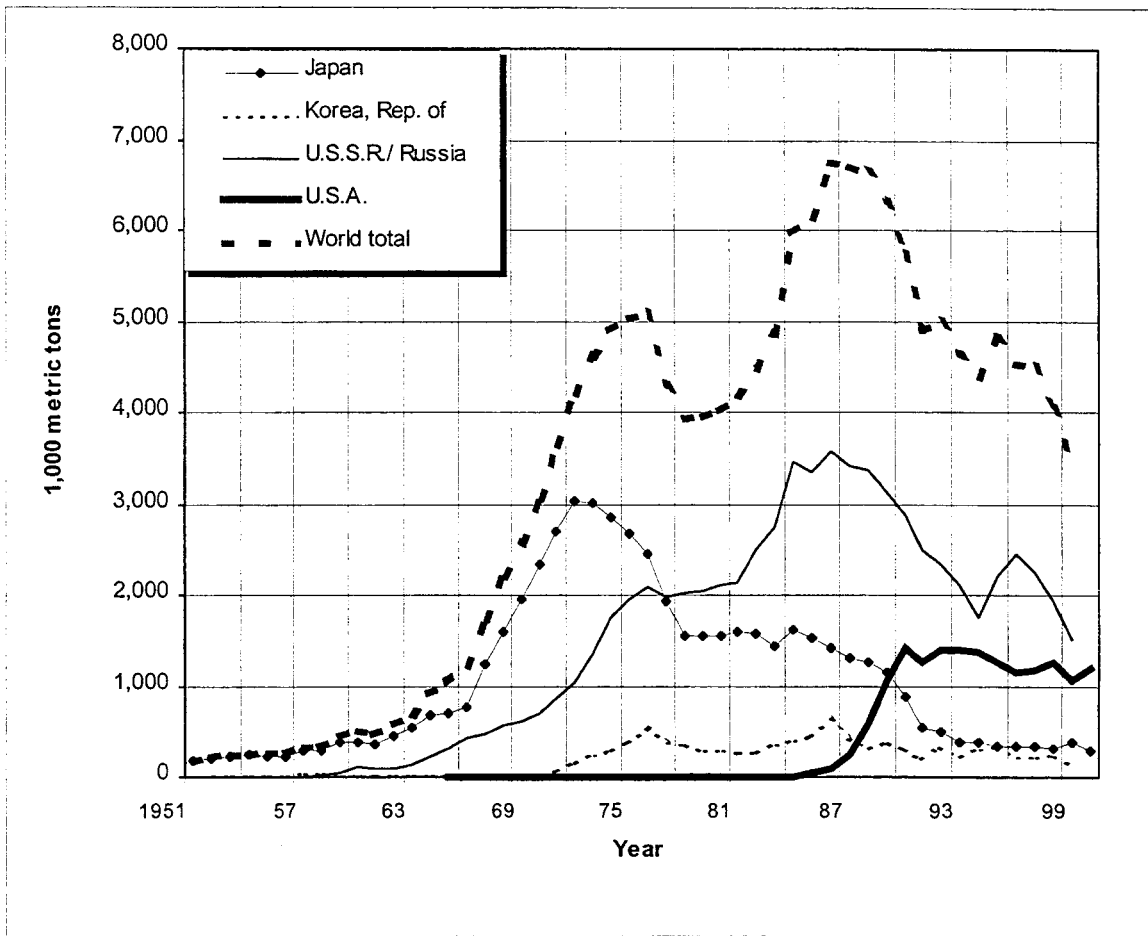


Figure 2. World landings of Alaska pollock by major countries, 1951-2001, (1,000 metric tons).

Sources: FAO 1955, 1957, 1962, 1966, 1974, 1977, 1978, 1982, 1983, 1989, 1992, 1995, 2001
 Suisan Tsushin Sha 2001, 2002
 U.S. Department of Commerce 2002

Japanese catch of Alaska pollock

Prior to 1959, Japanese harvests of Alaska pollock remained below 300,000 mt a year (Table 4), mostly caught in its coastal waters and off the Siberian coast. During the 1960s and the early 1970s Japanese harvests of Alaska pollock steadily escalated, reaching a peak in 1972 at over 3 million mt. The impetus for expanding the Alaska pollock fishery was the development of automated processing of Alaska pollock into frozen surimi and the introduction of factoryship operations in the 1960s. By 1972, Japan expanded its Alaska pollock fishing fleet as well as its range of operations throughout the North Pacific Ocean (Sonu 1986). At that time, Alaska pollock was Japan's major fishery, accounting for about one-third of its total marine fisheries catch (Table 4). The majority of the catch took place in U.S. waters (Figure 3).

The long period of steady growth in catch was followed by a downturn which came mainly as a result of the oil shock in 1974, which made fishing operations very expensive, but also because of restrictions on Japanese catches in the U.S. and the former Soviet EEZs, instituted in 1977. From 1978 through 1985, annual Japanese catches of Alaska pollock fairly stabilized at about 1.5 million mt. Since 1986, however, Japan's total catch of Alaska pollock has declined sharply as Japanese catch allocations within the U.S. and the former Soviet EEZs were greatly reduced. In 1987, the fishery was completely stopped off the United States. The total catch in 2001 of 242,000 mt was less than 8 percent of the record landings, and was the lowest catch in 45 years.

Alaska pollock is taken mostly by trawl, gillnet and longline. In 1999, about 58 percent of Alaska pollock were caught by trawl, 28 percent by gillnet, 4 percent by longline, and the rest by hook and line, dragnet, purse seine, and set net (Table 5). Annual catches for the trawl fishery decreased notably from 1987 to 2000 as Japanese trawling was prohibited in U.S. waters and significant catch restrictions were imposed in Russia waters.

Total allowable catch

In January 1997, Japan began implementing TAC levels for several species including Alaska pollock, Japanese sardine, Pacific saury, jack mackerel, chub mackerel, Tanner crab, and Japanese flying squid (Ministry of Agriculture, Forestry, and Fisheries 1999). The TAC is set by the Ministry of Agriculture, Forestry, and Fisheries together with prefectural governments (Ministry of Agriculture, Forestry, and Fisheries 1998).

The TAC for Alaska pollock was set at 374,000 mt in 2000, but due to low catches and abundance, it was decreased to 363,000

mt in 2001, and to 325,000 mt in 2002 (Table 6). Only about 56 percent of the 2001 TAC was landed.

Japanese catch in U.S. waters

The Japanese Alaska pollock fishery in Alaskan waters began in 1958 in the Bering Sea and in 1961 in the Gulf of Alaska (Suisan Sha 1969). The fishery grew rapidly in these areas and catches peaked in 1972 at 1.65 million mt, about 54 percent of its total landings of Alaska pollock for that year (Figure 3).

Since then, the Japanese harvest of Alaska pollock in U.S. waters has declined, following catch restrictions implemented after passage of the Magnuson Fishery Conservation and Management Act (MFCMA) in 1976 (Table 7). The Alaska pollock catch allocation to Japan in U.S. EEZ was reduced from 942,572 mt in 1980 to only 3,950 mt in 1987. Japanese Alaska pollock fishing was phased out in 1987 in the Gulf of Alaska and in 1988 in the Bering Sea and Aleutian Islands.

Japanese catch in Soviet/ Russian waters

Prior to 1977, Japanese fishermen caught large amounts of Alaska pollock off the former Soviet Unions's coast (Table 8). The Soviet Union, however, implemented its EEZ in 1977 and government representatives of Russia and Japan have met annually in recent years to determine catch quotas in their respective 200-mile fishing zones.

Japan's mutual catch quota which is "free-of-charge" for Alaska pollock in Soviet (now Russian) waters was significantly reduced from 370,000 mt in 1977 to 51,300 mt in 1986 and to 3,204 mt in 2002 (Table 8). To supplement Japan's declining Alaska pollock allocation, the Soviets have provided an additional fee-based catch allocation since 1987. However, this was also reduced steeply from 73,000 mt in 1987 to 11,500 mt in 1992, and to only 3,250 mt in 2002. The 2002 combined mutual and fee-based catch quota in Russian waters for Alaska pollock was about 6,000 mt.

Table 4. Japanese landings of fish used for surimi materials by species of fish and total annual catch of marine fishes, 1951-2001 (1,000 metric tons).

Year	Sardine	Jack mackerel	Chub mackerel	Alaska pollock	Atka mackerel	Croaker	Marine fishes Total
1951	368	87	151	184	-*	-	3,774
52	258	187	287	206	-	-	4,646
53	344	239	235	225	-	-	4,387
54	246	251	297	242	-	-	4,304
55	211	238	244	231	-	-	4,658
56	206	246	266	235	121	98	4,488
57	212	313	276	281	106	112	5,067
58	137	324	268	285	48	107	5,198
59	120	432	295	376	100	115	5,568
60	78	596	351	380	116	129	5,817
1961	127	542	338	353	185	116	6,287
62	108	518	409	453	122	102	6,397
63	56	463	465	532	150	103	6,200
64	16	520	496	684	205	74	5,868
65	9	560	669	691	107	101	6,382
66	13	514	624	775	106	98	6,558
67	17	423	687	1,247	82	85	7,241
68	24	358	1,015	1,606	87	71	7,993
69	21	341	1,011	1,944	103	66	7,976
70	17	269	1,302	2,347	147	64	8,598
1971	57	315	1,254	2,707	147	50	9,149
72	58	194	1,190	3,035	181	42	9,400
73	297	183	1,135	3,021	115	45	9,793
74	352	216	1,331	2,856	144	52	9,749
75	526	236	1,318	2,677	115	45	9,753
76	1,066	207	977	2,445	229	39	9,605
77	1,420	187	1,355	1,931	235	40	9,688
78	1,637	154	1,626	1,546	135	37	9,683
79	1,817	185	1,414	1,551	119	39	9,477
80	2,198	147	1,301	1,552	117	32	9,909
1981	3,089	125	908	1,595	123	33	10,143
82	3,290	178	718	1,567	103	30	10,231
83	3,745	179	805	1,434	56	27	10,697
84	4,179	238	814	1,621	66	24	11,501
85	3,866	225	773	1,532	66	21	10,877
86	4,210	186	945	1,422	89	20	11,341
87	4,362	258	701	1,313	99	19	11,129
88	4,488	297	649	1,259	104	17	11,259
89	4,099	286	527	1,154	115	14	10,440
90	3,678	337	273	871	134	13	9,570
1991	3,010	321	255	541	130	13	8,511
92	2,224	293	269	499	98	11	7,771
93	1,714	368	665	382	136	8	7,256
94	1,189	380	633	379	153	8	6,590
95	661	390	470	339	177	9	6,007
96	319	392	760	331	182	7	5,974
97	284	373	849	339	207	6	5,985
98	167	370	511	316	241	5	5,315
99	351	258	382	382	169	5	5,239
2000	150	246	346	300	165	5	5,022
2001	179	212	371	242	161	4	4,730

*.....not available

Sources: Ministry of Agriculture, Forestry & Fisheries 1967-2002
Suisan Tsushin Sha 2002

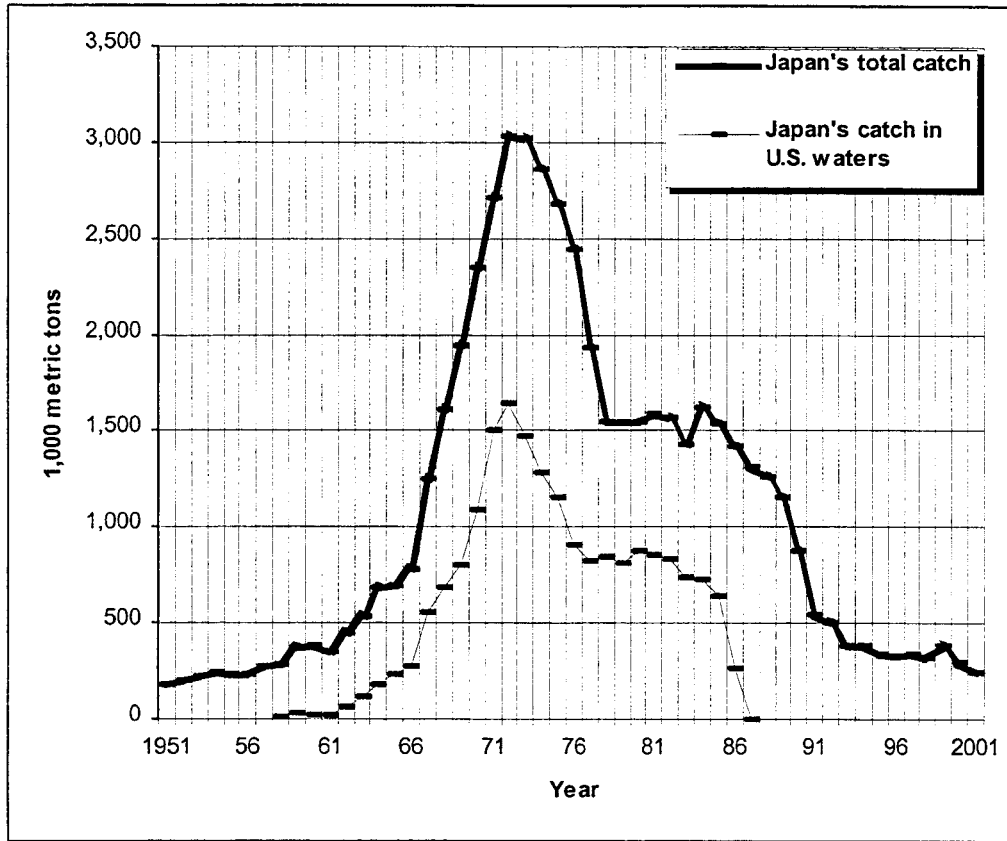


Figure 3. Japan's total catch of Alaska pollock and catch of Alaska pollock in U.S. waters, 1951-2001 (1,000 metric tons).

Sources: International North Pacific Fisheries Commission 1969
 Japan Food Economy Company 1978
 Suisan Sha 1974
 Ministry of Agriculture, Forestry & Fisheries 1967, 1970, 1978, 1983, 1999, 2002
 Suisan Tsushin Sha 2002

Table 5. Japanese landings of Alaska pollock by fishery type, 1987-2000 (metric tons).

Year	Trawls			Gillnets	Longlines	Others	Total
	Distant	Offshore	Small				
1987	840,572	221,014	10,421	202,192	28,056	10,254	1,312,509
1988	784,178	267,366	9,628	154,310	30,981	9,632	1,259,095
1989	676,518	240,620	8,091	179,574	33,036	15,911	1,153,750
1990	417,050	235,615	5,832	169,469	28,114	15,328	871,408
1991	144,068	223,701	5,760	132,418	27,940	7,059	540,946
1992	140,639	214,856	4,103	101,870	25,405	11,883	498,756
1993	118,419	147,705	2,958	86,566	19,916	6,744	382,308
1994	121,068	149,959	2,349	70,368	18,802	16,805	379,351
1995	71,640	162,199	2,453	71,255	16,095	14,865	338,507
1996	83,104	156,596	2,098	58,694	16,136	14,535	331,163
1997	81,898	158,117	1,831	53,195	20,811	22,933	338,785
1998	49,516	151,242	1,595	70,856	13,795	28,983	315,987
1999	43,585	177,927	1,563	107,650	14,291	37,369	382,385
2000	41,916	160,501	1,466	63,200	12,979	19,939	300,001

Others include hook and line, dragnet, purse seine, and set net
 Sources: Ministry of Agriculture, Forestry, & Fisheries 1999-2002

Table 6. Total allowable catch (TAC) and actual landings of Alaska pollock, 1997-2002.

Year	TAC ..1,000 metric tons..	Landings*	Percent of TAC
1997	267	246	92
1998	311	259	83
1999	374	343	92
2000	374	245	66
2001	363	205	56
2002	325		

*...Japanese catch in foreign waters are not included

Sources: Suisan Tsushin Sha 2000, 2001, 2002
 Ministry of Agriculture, Forestry and Fisheries 1999, 2002
 Suisan Sha 1999, 2000, 2001, 2002
 Hokkai Keizai Shinbun Sha 2002

Table 7. Japan's Alaska pollock catch allocations and the actual catch in the U.S. Exclusive Economic Zone by region, 1977-1988 (metric tons)

Year	Gulf of Alaska		Bering Sea/Aluetian Islands		Total	
	(Allocation)	(Catch)	(Allocation)	(Catch)	(Allocation)	(Catch)
1977	44,100	42,415	792,300	782,419	836,400	824,834
1978	40,740	26,093	792,300	821,307	833,040	847,400
1979	38,279	31,920	774,630	779,050	812,909	810,970
1980	46,745	37,897	895,827	832,993	942,572	870,890
1981	82,385	51,885	859,502	803,461	941,887	855,346
1982	90,907	55,046	845,064	780,351	935,971	835,397
1983	58,992	47,725	738,313	684,424	797,305	732,149
1984	77,821	57,864	693,031	665,672	770,852	723,536
1985	25,000	22,937	640,601	620,112	665,601	643,049
1986	140	114	298,013	262,423	298,153	262,537
1987	0	0	3,950	3,283	3,950	3,283
1988	0	0	0	0	0	0

Source: U.S. Department of Commerce 1978-1989

Table 8. Japan's Alaska pollock catch allocations in the Soviet/Russian waters, 1974-2002 (metric tons)

Year	Mutual quota	Paid quota	Total quota
1974	855,000*	0	855,000*
1975	652,000*	0	652,000*
1976	617,000*	0	617,000*
1977	370,000	0	370,000
1978	345,000	0	345,000
1979	300,000	0	300,000
1980	290,000	0	290,000
1981	290,000	0	290,000
1982	290,000	0	290,000
1983	290,000	0	290,000
1984	270,000	0	270,000
1985	250,000	0	250,000
1986	51,300	0	51,300
1987	51,300	73,430	124,730
1988	53,860	73,740	127,600
1989	53,480	67,000	120,480
1990	25,736	15,000	40,736
1991	25,727	16,000	41,727
1992	25,732	11,500	37,232
1993	21,732	7,500	29,232
1994	21,726	7,100	28,826
1995	17,976	7,000	24,976
1996	14,009	3,000	17,009
1997	14,167	3,000	17,167
1998	12,167	3,577	15,744
1999	6,667	3,414	10,081
2000	6,300	3,370	9,670
2001	1,551	3,250	4,801
2002	3,204	3,250	6,454

*...Actual catch

Source: Suisan Sha 1975-2002

IMPORTS

Japan is the world's largest importer of frozen surimi. In 2001, Japan imported 309,312 mt of frozen surimi valued at \$571 million (Tables 9 and 10). Frozen Alaska pollock surimi was the dominant product imported into Japan in recent years, representing as much as 46 percent in volume and 41 percent in value in 2001. Frozen threadfin bream surimi was 19 percent in volume and 15 percent in value, while imports of frozen cod surimi, frozen Pacific whiting surimi, and frozen croaker surimi were minor, with combined shares of about 4 percent in volume and 5 percent in value. Frozen surimi made with other species accounted for 31 percent in volume and 39 percent in value.

Japanese imports of frozen surimi from Alaska pollock came mostly from the United States, with lesser quantities imported from Russia, the Republic of Korea, China, Argentina, Hong Kong, Spain, and Thailand (Tables 11 and 12). Supplies of Alaska pollock surimi from the United States increased in 2001 to a record level, while shipments of this product from Russia, the Republic of Korea, and China decreased sharply. Imports of Alaska pollock surimi, however, decreased sharply from 72,499 mt in January-July 2001 to 56,834 mt in January-July 2002 due to decreased production and exports of surimi by the United States (Suisan Keizai Sha 2002).

Imports of frozen cod and Pacific whiting surimi, fluctuated between 17,000 and 26,000 mt from 1995 to 2000 (Table 13). The United States has consistently been the leading supplier of frozen Pacific whiting surimi to Japan, providing over 94 percent of the total (Tables 13 and 14). Imports in 2001 declined sharply from 2000 due mostly to decreased production and exports by the United States and Canada of Pacific whiting surimi. Supply of cod and Pacific whiting surimi for January-July 2002 was only 1,999 mt compared with 3,868 mt for the same period a year earlier. The United States supplied 96 percent of the total (Suisan Keizai Sha 2002).

Imports of frozen threadfin bream surimi rose sharply from 29,000 mt in 1995 to 59,000 mt in 2001 (Table 15). The products came mostly from Thailand, Hong Kong, and India (Tables 15 and 16). Since 1998, India replaced Hong Kong as the second leading supplier of this product to Japan. Significant quantities were also imported from Indonesia, Viet Nam, and Myanmar. Japan imported 79 mt of this product from the United States in 2001.

Imports of frozen croaker surimi increased sharply from 1995 to a high in 1997, but have since shown a downward trend (Tables 17 and 18). Supplies of frozen croaker surimi from Hong Kong, India, and Venezuela to Japan have declined since 1997, while shipments of this product from Myanmar have increased sharply.

Total imports of other frozen surimi have remained fairly stable since 1995, ranging between 83,000 and 103,000 mt (Tables 19 and 20). Thailand and Argentina continued to dominate the supplies of other frozen surimi. Supplies of frozen surimi from

the Republic of Korea to Japan have declined sharply since 1995.

Trade barriers

Japan regulates imports of surimi with import quota (IQ) and tariffs. Import quotas are set once a year, with new quotas announced each year. To meet strong demand, the Japanese government increased the IQ for Alaska pollock surimi from 19,100 mt for fiscal year (FY) 1986 to 126,200 mt for FY 1988, and then to 205,400 mt for FY 2002 (Table 21).

While the Japanese Ministry of International Trade and Industry is the lead agency in administering the quota system, it coordinates its actions closely with the Fisheries Agency of the Ministry of Agriculture, forestry, and Fisheries (FAJ). In addition to setting quotas for imports, the government also controls the allocation among the following recipient groups:

- A. Traders: Trading companies with past import history;
- B. Users: Processors' associations, which usually hire traders to perform import functions on their behalf;
- C. Fishermen: Fishermen or fishery organizations fishing in foreign waters and designated by FAJ Director General, or those who received import orders from such fishermen or fishery organizations;
- D. Overseas fishery development: Companies which received import orders from the Overseas Fishery Cooperation Foundation;
- E. First-Come-First-Served: Companies which have import contract for Alaska pollock surimi (more than 10 mt) signed after the date of this IQ announcement.

There is a great deal of variation in the amount of quota held by recipient groups (Table 21) and individual importers. Japanese importers holding surimi import quota allocations are listed in Appendix 1.

Imports of frozen surimi are subject to tariffs. As the United States and Japan are signatories to the World Trade Organization (WTO), WTO tariffs apply to U.S. exports of frozen surimi and frozen fish meat: 4.2 percent for frozen surimi and frozen fish meat of cod, pollack, hake; and 3.5 percent for frozen surimi of threadfin bream (Japan Fish Traders Association 2002).

Tariff rates are calculated as percentage of cost, insurance, and freight (CIF) value.

Table 9. Japanese annual imports of frozen surimi by products and volume, 1986-2001 (metric tons).

Year	Alaska pollock	Cod/Pacific whiting	Threadfin bream	Croaker	Other surimi	Total
1995	149,165	19,487	33,592	5,404	82,679	290,327
1996	126,750	17,228	28,507	6,431	87,073	265,989
1997	125,011	26,285	37,319	10,408	103,007	302,030
1998	108,221	17,700	36,365	7,608	84,149	254,043
1999	103,740	20,121	45,098	8,326	88,309	265,594
2000	106,505	17,577	49,741	7,951	87,474	269,248
2001	142,213	6,034	59,131	7,365	94,569	309,312

Source: Japan Fish Traders Association 1996-2002

Table 10. Japanese annual imports of frozen surimi by products and value, 1986-2001 (U.S. \$1,000).

Year	Alaska pollock	Cod	Threadfin bream	Croaker	Other surimi	Total
1995	411,316	52,428	84,848	17,054	285,756	851,402
1996	268,285	28,814	64,478	19,776	292,780	674,133
1997	322,832	66,675	86,755	31,503	331,191	838,956
1998	209,569	24,722	56,473	15,759	203,008	509,531
1999	259,175	41,208	83,880	20,140	239,375	643,778
2000	207,465	29,881	86,506	22,013	231,950	577,815
2001	233,284	9,213	86,020	18,042	224,463	571,022

Source: Japan Fish Traders Association 1996-2002

Table 11. Japanese imports of frozen Alaska pollock surimi by country of origin and volume, 1995-2001 (metric tons).

Country of origin	1995	1996	1997	1998	1999	2000	2001
U.S.A.	124,074	110,480	110,957	93,719	89,745	99,118	137,193
Russia	22,071	15,715	12,650	13,315	13,697	7,387	4,676
Korea, rep.	1,764	211	1,039	999	298	0	278
China	1,256	339	349	0	0	0	48
Argentina	0	0	0	0	0	0	18
Hong Kong	0	0	0	188	0	0	0
Spain	0	0	17	0	0	0	0
Thailand	0	6	0	0	0	0	0
Total	149,165	126,750	125,011	108,221	103,740	106,505	142,213

Total may not add due to rounding

Source: Japan Fish Traders Association 1996-2002

Table 12. Japanese imports of frozen Alaska pollock surimi by country of origin and value, 1995-2001 (U.S. \$1,000).

Country of origin	1995	1996	1997	1998	1999	2000	2001
U.S.A.	343,153	231,919	283,638	180,480	223,460	191,907	225,370
Russia	60,295	35,280	35,909	27,035	34,880	15,558	7,287
Korea, rep.	4,660	459	2,457	1,974	835	0	472
China	3,208	611	786	0	0	0	122
Argentina	0	0	0	0	0	0	33
Hong Kong	0	0	0	79	0	0	0
Spain	0	0	42	0	0	0	0
Thailand	0	16	0	0	0	0	0
Total	411,316	268,285	322,832	209,569	259,175	207,465	233,284

Total may not add due to rounding

Source: Japan Fish Traders Association 1996-2002

Table 13. Japanese imports of frozen cod and Pacific whiting surimi (excluding Alaska pollock surimi) by country of origin and volume, 1995-2001 (metric tons).

Country of origin	1995	1996	1997	1998	1999	2000	2001
U.S.A.	18,738	16,407	24,838	17,010	19,077	16,519	5,918
Chile	688	624	544	0	0	100	95
Canada	20	19	903	646	1,044	796	21
Russia	0	50	0	0	0	142	0
Argentina	41	128	0	26	0	20	0
Thailand	0	0	0	18	0	0	0
Total	19,487	17,228	26,285	17,700	20,121	17,577	6,034

Total may not add due to rounding

Source: Japan Fish Traders Association 1996-2002

Table 14. Japanese imports of frozen cod and Pacific whiting surimi (excluding Alaska pollock surimi) by country of origin and value, 1995-2001 (U.S. \$1,000).

Country of origin	1995	1996	1997	1998	1999	2000	2001
U.S.A.	50,872	27,169	63,099	23,708	39,320	28,048	8,964
Chile	1,468	1,353	1,380	0	0	205	218
Canada	45	28	2,195	921	1,889	1,321	32
Russia	0	127	0	0	0	265	0
Argentina	42	136	0	63	0	41	0
Thailand	0	0	0	30	0	0	0
Total	52,428	28,814	66,675	24,722	41,208	29,881	9,213

Total may not add due to rounding

Source: Japan Fish Traders Association 1996-2002

Table 15. Japanese imports of frozen threadfin bream surimi by country of origin and volume, 1995-2001 (metric tons).

Country of origin	1995	1996	1997	1998	1999	2000	2001
Thailand	24,167	21,582	24,547	31,167	38,076	40,689	40,909
India	478	277	2,786	3,375	5,857	7,436	14,835
Indonesia	0	86	836	600	822	1,178	2,707
Viet Nam	138	5	179	191	74	39	309
Myanmar	34	4	119	163	132	356	220
U.S.A.	0	0	0	0	24	0	79
Singapore	0	0	0	8	24	0	54
China	201	125	34	5	50	18	18
Malaysia	154	54	71	96	40	24	1
Hong Kong	8,419	6,351	8,748	747	0	0	0
Korea, Rep.	0	24	0	0	0	0	0
Taiwan	0	0	0	14	0	0	0
Total	33,592	28,507	37,319	36,365	45,098	49,741	59,131

Total may not add due to rounding

Source: Japan Fish Traders Association 1996-2002

Table 16. Japanese imports of frozen threadfin bream surimi by country of origin and value, 1995-2001 (U.S. \$1,000).

Country of origin	1995	1996	1997	1998	1999	2000	2001
Thailand	62,507	46,266	56,966	48,556	72,589	71,670	60,455
India	1,306	469	5,232	4,731	9,739	12,667	21,062
Indonesia	0	202	2,028	862	939	1,504	3,632
Viet Nam	209	8	383	397	141	70	346
Myanmar	85	8	216	252	197	519	289
U.S.A.	0	0	0	0	40	0	121
Singapore	0	0	0	11	48	0	84
China	526	352	85	7	105	40	25
Malaysia	328	89	152	136	82	36	7
Hong Kong	19,886	17,027	21,693	1,509	0	0	0
Korea, Rep.	0	57	0	0	0	0	0
Taiwan	0	0	0	13	0	0	0
Total	84,848	64,478	86,755	56,473	83,880	86,506	86,020

Total may not add due to rounding

Source: Japan Fish Traders Association 1996-2002

Table 17. Japanese imports of frozen croaker surimi by country of origin and volume, 1995-2001 (metric tons).

Country of origin	1995	1996	1997	1998	1999	2000	2001
Thailand	3,528	3,448	4,273	4,435	4,938	4,409	4,543
China	1,251	902	1,976	1,511	1,765	1,507	1,509
India	49	630	1,167	915	1,127	1,089	613
Myanmar	108	62	141	150	263	390	406
Mexico	154	206	153	75	179	195	125
Venezuela	108	216	528	125	20	284	76
Indonesia	0	40	89	40	5	0	72
Taiwan	17	15	18	25	16	18	17
Viet Nam	103	10	17	3	0	0	5
Korea, Rep.	0	2	1	0	0	0	0
Hong Kong	65	901	2,047	328	0	0	0
Malaysia	21	0	0	0	10	60	0
Panama	0	0	0	0	2	0	0
Total	5,404	6,431	10,408	7,608	8,326	7,951	7,365

Total may not add due to rounding

Source: Japan Fish Traders Association 1996-2002

Table 18. Japanese imports of frozen croaker surimi by countries of origin and value, 1995-2001 (U.S. \$1,000).

Country of origin	1995	1996	1997	1998	1999	2000	2001
Thailand	11,316	9,589	12,938	9,113	11,986	13,039	11,012
China	3,808	2,789	4,967	4,102	4,440	4,123	4,125
India	89	1,386	2,693	1,450	2,321	2,095	1,199
Myanmar	328	158	373	278	469	782	765
Mexico	730	935	654	331	799	855	559
Venezuela	304	624	1,486	359	28	927	234
Indonesia	0	90	232	47	6	0	100
Taiwan	57	46	55	63	41	44	42
Viet Nam	180	46	52	10	0	0	7
Korea, Rep.	0	3	2	0	0	0	0
Hong Kong	212	4,109	8,050	5	0	0	0
Malaysia	50	0	0	0	44	149	0
Panama	0	0	0	0	5	0	0
Total	17,054	19,776	31,503	15,759	20,140	22,013	18,042

Total may not add due to rounding

Source: Japan Fish Traders Association 1996-2002

Table 19. Japanese imports of frozen other surimi by major countries of origin and volume, 1995-2001 (metric tons).

Country of origin	1995	1996	1997	1998	1999	2000	2001
Thailand	32,644	28,433	35,190	32,329	34,358	34,587	40,798
Argentina	21,502	19,905	23,201	21,107	22,356	22,407	16,654
Chile	4,527	7,937	8,469	9,736	8,200	6,613	9,887
China	8,440	10,525	13,007	8,994	10,014	10,424	9,706
Panama	0	0	0	2	350	1,992	3,286
Denmark	29	114	70	35	156	595	2,809
Korea, Rep.	8,175	6,782	6,077	5,517	4,048	2,702	2,171
Viet Nam	795	1,266	1,695	1,301	1,467	1,716	1,976
Peru	698	618	1,122	981	1,705	1,518	1,931
U.S.A.	2,169	1,632	2,935	1,152	1,585	1,063	1,528
India	1	144	811	91	474	653	1,019
Norway	205	207	139	392	910	1,021	855
Indonesia	139	528	2,243	782	225	343	535
New Zealand	59	109	86	45	637	23	328
U.K.	20	0	16	46	280	229	214
Venezuela	0	0	4	3	236	56	168
Philippine	525	635	474	388	201	174	82
Iceland	200	81	61	107	50	558	65
Myanmar	341	50	24	17	29	32	42
Taiwan	665	554	2,123	359	183	144	41
Hong Kong	976	6,913	4,625	271	21	0	2
Malaysia	350	91	55	24	0	18	0
Others	219	549	580	470	824	606	472
Total	82,679	87,073	103,007	84,149	88,309	87,474	94,569

Total may not add due to rounding

Source: Japan Fish Traders Association 1996-2002

Table 20. Japanese imports of frozen other surimi by major countries of origin and value, 1995-2001 (U.S. \$1,000).

Country of origin	1995	1996	1997	1998	1999	2000	2001
Thailand	92,467	78,901	94,021	60,615	74,021	75,164	77,670
China	36,147	46,453	60,134	36,469	40,972	48,522	48,203
Argentina	59,908	40,099	56,456	36,468	50,013	44,172	28,982
Chile	11,778	19,156	23,637	20,682	20,544	16,015	22,957
Korea, Rep.	57,073	47,902	42,637	27,863	23,995	19,592	15,779
Viet Nam	2,612	4,044	5,650	4,985	4,554	4,833	5,937
Peru	1,889	1,784	3,378	2,957	4,681	3,722	5,072
Denmark	98	306	172	72	786	1,144	4,271
Norway	937	1,067	558	2,382	4,118	4,467	4,154
U.S.A.	5,194	2,948	5,475	1,652	3,530	2,124	2,497
India	2	237	1,345	112	585	738	1,092
Indonesia	535	1,227	5,245	1,324	419	543	1,031
Panama	0	0	0	4	109	584	985
New Zealand	165	242	246	145	1,554	91	707
Philippine	5,472	6,679	3,294	1,883	1,157	1,278	540
U.K.	37	0	23	170	766	622	489
Iceland	1,418	1,006	808	1,026	770	1,194	478
Venezuela	0	0	5	4	338	81	250
Myanmar	1,000	116	70	40	300	343	191
Taiwan	1,717	1,413	3,674	945	890	430	70
Hong Kong	4,517	34,054	21,106	161	24	0	7
Malaysia	726	138	98	35	0	81	0
Others	2,064	5,008	3,159	3,014	5,249	6,210	3,101
Total	285,756	292,780	331,191	203,008	239,375	231,950	224,463

Total may not add due to rounding

Source: Japan Fish Traders Association 1996-2002

Table 21. Allocation of Japanese import quotas for Alaska pollock and Alaska pollock surimi by recipient groups for Japan's fiscal years* 1986-1988 and 1998-2002 (metric tons).

Fiscal year	Total	Traders	Users	Fishermen	Overseas	First-come- First-served
Alaska pollock (round weight) and Alaska pollock surimi**						
1986	95,500	-***	-	-	-	-
1987	147,000	-	-	-	-	-
1988	631,000	-	-	-	-	-
1998	1,027,000	91,500	55,500	180,000	700,000	0
1999	1,027,000	91,500	55,500	180,000	700,000	0
2000	1,027,000	100,940	63,060	160,000	700,000	3,000
2001	1,027,000	100,940	63,060	160,000	700,000	3,000
2002	1,027,000	100,940	63,060	160,000	700,000	3,000

*.... Japan's fiscal year extends from April 1 through March 31 of the following year.

**.. If imported as surimi, fish weight shall be calculated by multiplying surimi weight by 5.

-***..not available

Source: U.S. embassy, Tokyo 1989, 1998-2002

EXPORTS

Japanese exports of frozen surimi from 1988 through 2001 are summarized in Table 22. In 2001, Japan exported 3,749 mt, amounting to \$9.85 million worth of frozen surimi, a decrease of 18 percent in volume and in value from the 2000 level.

Japan's export of frozen Alaska pollock surimi hovered near a meager 700 mt until about 1980 (Table 23). Exports began to rise sharply in 1981 and continued the trend through 1986. Total exports of surimi increased almost 10 times, from 709 mt in 1980 to 6,676 mt in 1986. The U.S. share of the exports was about 91 percent in 1986.

The sudden surge in the Japanese sale of frozen Alaska pollock surimi to the United States from 1981 to 1986 stemmed from the interest shown by the U.S. food industry in producing imitation crab meat in this country. Exports of Alaska pollock surimi to the United States began to decline in 1987.

In 2001, Japan exported only 309 mt of frozen Alaska pollock surimi, a decrease of 53 percent from the 660 mt exported during 2000. Taiwan was the major market taking 41 percent in volume of Japanese exports of frozen Alaska pollock surimi in 2001. Other important buyers in 2001 were the Republic of Korea (34 percent), China (15 percent) and New Zealand (11 percent). The United States has not purchased frozen Alaska pollock surimi since 2000.

Exports of frozen other surimi in 2001 also showed a decrease from 2000 (Table 24). Much of the decrease was due to lower exports to New Zealand. New Zealand was by far the largest market purchasing 74 percent in volume of Japanese exports of this product. Other important buyers for frozen other surimi in 2001 were the Republic of Korea (17 percent) and the United States (4 percent).

Table 22. Japan's annual exports of frozen surimi by volume and value, 1988-2001.

Year	Alaska pollock		Other surimi		Total	
	Volume*	Value**	Volume*	Value**	Volume*	Value**
1988	724	207	163	60	887	267
1989	398	115	272	75	670	190
1990	707	246	77	48	784	294
1991	1,486	763	160	83	1,646	846
1992	1,155	465	424	133	1,579	598
1993	70	22	126	35	196	57
1994	163	44	1,161	314	1,324	358
1995	39	14	5,028	992	5,067	1,006
1996	843	188	3,805	776	4,648	964
1997	2,627	1,449	2,788	1,218	5,415	2,667
1998	1,085	436	639	202	1,724	638
1999	596	125	292	317	888	442
2000	660	108	3,892	1,346	4,552	1,454
2001	309	46	3,440	1,145	3,749	1,191

volume* in metric tons
value**in million yen

Sources: Ministry of Finance 1989-2002

Table 23. Japan's exports of frozen Alaska pollock surimi by major countries of destination and volume, 1974-2001 (metric tons)

Year	Total	U.S.A.	Taiwan	China	Korea, Rep. of	Hong Kong	New Zealand	Australia
1974	603	599	-*	-	-	-	-	-
1975	695	686	-	-	-	-	-	-
1976	489	488	-	-	-	-	-	-
1977	793	771	-	-	-	-	-	-
1978	661	655	-	-	-	-	-	-
1979	693	681	-	-	-	-	-	-
1980	709	703	-	-	-	-	-	-
1981	928	829	-	-	-	-	-	-
1982	1,276	1,114	-	-	-	-	-	-
1983	1,963	1,708	-	-	-	-	-	-
1984	2,580	2,306	-	-	-	-	-	-
1985	5,158	4,801	-	-	-	-	-	-
1986	6,676	6,056	-	-	-	-	-	-
1987	1,233	-	-	-	-	-	-	-
1988	724	13	65	115	230	0**	0	1
1989	398	12	90	173	20	16	0	33
1990	707	3	77	22	514	17	0	1
1991	1,486	6	79	63	1,186	1	0	2
1992	1,155	60	16	0	692	1	0	31
1993	70	2	0	0	0	1	0	64
1994	163	3	0	23	0	0	0	90
1995	39	1	0	1	36	1	0	1
1996	843	1	100	19	395	111	214	0
1997	2,627	2	110	14	0	2,329	145	0
1998	1,085	1	217	7	0	678	163	0
1999	596	1	144	20	347	1	80	1
2000	660	0	253	117	290	0	0	0
2001	309	0	126	45	105	0	33	0

-*not available

0** ...no exports

Total may include other countries not listed

Sources: Japan Frozen Foods Inspection Corporation 1975-1988
 Ministry of Finance 1988-2002
 Sonu 1975-1991

Table 24. Japan's exports of frozen other surimi by major countries of destination and volume, 1988-2001 (metric tons)

Year	Total	U.S.A.	Taiwan	China	Korea, Rep. of	Hong Kong	New Zealand	Australia
1988	163	47	1	1	1	5	100	0*
1989	272	34	0	10	1	1	205	0
1990	77	15	18	11	3	1	0	0
1991	160	38	0	1	61	1	0	1
1992	424	43	24	0	334	1	21	1
1993	126	11	28	0	83	3	0	0
1994	1,161	43	1	1	65	191	834	0
1995	5,028	15	18	15	1,533	2,427	1,012	0
1996	3,805	8	3	7	672	3,100	0	1
1997	2,788	61	113	124	1,109	1,365	0	0
1998	639	42	45	99	400	47	0	1
1999	292	109	26	50	25	32	1	0
2000	3,892	119	180	537	49	16	2,945	18
2001	3,440	154	11	111	599	1	2,542	1

0* ...no exports

Total may include other countries not listed

Sources: Ministry of Finance 1989-2002

COLD STORAGE HOLDINGS

Table 25 shows Japan's monthly inventories of frozen Alaska pollock surimi, frozen surimi (excluding Alaska pollock surimi), and total frozen surimi between 1987 and 2002. Monthly average inventories of Alaska pollock surimi, frozen surimi, and total frozen surimi for May, June, and July 2002 were lower than the level in the same period a year earlier due mainly to decreased supply from imports.

From the January 1999 to July 2002, Japanese inventories of frozen surimi had been lower than the level in the preceding year.

Table 25. Japanese monthly cold storage holdings of frozen Alaska pollock surimi, frozen surimi (excluding frozen Alaska pollock surimi), and total frozen surimi, 1987-2002 (metric tons).

Year	Jan.	Feb.	March	April	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.
Frozen Alaska pollock surimi												
1987	119,971	140,394	154,720	162,640	166,783	167,716	152,711	140,781	128,781	118,281	114,192	116,590
1988	124,220	142,440	147,256	136,325	138,682	135,355	118,941	110,544	104,170	99,005	94,580	101,220
1989	117,178	129,902	125,917	115,753	109,638	101,494	90,018	82,884	79,172	85,149	91,088	95,875
1990	104,414	110,919	110,202	101,692	104,417	106,474	99,686	99,073	97,961	99,970	93,059	87,266
1991	76,815	78,158	83,706	80,601	76,518	72,574	68,353	77,114	83,336	83,250	77,986	76,976
1992	80,911	92,150	108,585	119,635	119,650	112,455	110,464	117,593	122,914	124,085	120,249	113,647
1993	113,050	107,931	117,508	117,653	109,860	101,768	93,955	86,056	88,603	106,011	101,829	93,775
1994	84,630	85,305	104,424	94,371	87,666	81,893	73,381	65,629	68,563	80,694	82,849	77,462
1995	73,555	73,282	92,122	96,638	96,173	92,806	85,097	78,369	79,584	95,856	89,295	80,440
1996	72,557	67,329	73,082	74,126	69,673	62,494	53,713	46,881	42,433	51,375	54,303	48,938
1997	43,191	40,761	47,098	47,841	46,495	44,877	43,727	41,285	42,697	57,329	57,073	56,421
1998	50,905	50,810	59,743	60,039	59,131	52,530	46,838	41,751	38,766	45,563	50,039	49,190
1999	49,100	45,334	57,062	57,125	56,014	53,659	52,252	45,185	45,035	59,368	62,388	60,930
2000	51,421	45,591	50,954	54,730	57,643	55,059	50,631	45,449	49,566	56,571	54,944	53,555
2001	52,255	46,940	54,183	58,131	61,610	58,351	55,360	49,767	54,903	58,150	59,010	53,142
2002	46,978	48,031	54,774	64,954	59,783	55,385	47,780					
Frozen surimi, excluding Alaska pollock surimi												
1987	14,687	15,237	18,647	18,280	23,691	23,546	21,859	22,203	21,431	20,215	18,862	19,352
1988	18,324	20,500	22,376	21,205	22,135	22,091	21,450	23,704	26,465	29,061	27,366	28,069
1989	29,509	29,569	32,349	31,155	32,072	29,965	30,730	31,031	33,711	32,669	32,681	29,966
1990	27,907	26,268	25,201	23,861	22,837	24,982	25,936	26,891	27,750	29,921	28,029	22,566
1991	26,351	20,785	26,659	25,037	23,918	26,010	27,820	29,554	35,477	37,410	39,450	39,298
1992	39,120	40,982	45,644	45,544	43,148	41,599	39,748	41,923	45,345	46,703	45,200	41,722
1993	40,623	39,237	45,227	45,285	47,163	49,345	47,315	46,776	46,881	48,128	43,913	39,913
1994	38,660	38,500	39,800	41,751	42,786	45,155	45,778	44,279	45,629	48,443	40,136	36,548
1995	39,502	38,218	42,227	42,307	41,888	43,576	44,114	45,356	48,156	51,523	47,505	46,430
1996	46,966	45,311	43,569	43,336	43,675	45,187	43,233	40,218	41,426	46,418	44,640	40,087
1997	36,596	35,323	38,840	37,667	37,419	38,902	43,354	44,657	44,981	56,916	54,210	49,878
1998	48,451	47,861	48,419	47,460	47,389	44,856	46,435	46,010	50,421	58,081	57,870	50,425
1999	46,406	42,642	45,261	44,643	45,192	42,092	41,045	38,844	41,731	47,244	48,234	47,640
2000	46,990	41,912	42,751	44,167	42,545	40,842	39,798	37,472	38,114	38,496	47,021	33,273
2001	30,436	29,484	31,881	30,893	31,464	31,888	30,082	30,087	28,257	32,003	34,770	30,453
2002	27,724	24,450	26,327	28,718	29,159	27,712	25,762					

Table 25 (continued). Japanese monthly cold storage holdings of frozen Alaska pollock surimi, frozen surimi (excluding frozen Alaska pollock surimi), and total frozen surimi, 1987-2002 (metric tons).

Year	Jan.	Feb.	March	April	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.
Total frozen surimi												
1987	134,658	155,631	173,367	180,920	190,474	191,262	174,570	162,984	150,212	138,496	133,054	135,942
1988	142,544	162,940	169,632	157,530	160,817	157,446	140,391	134,248	130,635	128,066	121,946	129,289
1989	146,687	159,471	158,266	146,908	141,710	131,459	120,748	113,915	112,883	117,818	123,769	125,841
1990	132,321	137,187	135,403	125,553	127,254	131,456	125,622	125,964	125,711	129,891	121,088	109,832
1991	103,166	98,943	110,365	105,638	100,436	98,584	96,173	106,668	118,813	120,660	117,436	116,274
1992	120,031	133,132	154,229	165,179	162,798	154,054	150,212	159,516	168,259	170,788	165,449	155,369
1993	153,673	147,168	162,735	162,938	157,023	151,113	141,270	132,832	135,484	154,139	145,742	133,688
1994	123,290	123,805	144,224	136,122	130,452	127,048	119,159	109,908	114,192	129,137	122,985	114,010
1995	113,057	111,500	134,349	138,945	138,061	136,382	129,211	123,725	127,740	147,379	136,800	126,870
1996	119,523	112,640	116,651	117,462	113,348	107,681	96,946	87,099	83,859	97,793	98,943	89,025
1997	79,787	76,084	85,938	85,508	83,914	83,779	87,081	85,942	87,678	114,245	111,283	106,299
1998	99,356	98,671	108,162	107,499	106,520	97,386	93,273	87,761	89,187	103,644	107,909	99,615
1999	99,525	91,740	99,704	102,386	100,657	98,851	94,344	86,230	83,879	101,099	109,632	109,164
2000	98,411	87,503	93,705	98,897	100,188	95,901	90,429	82,921	87,680	95,067	91,965	86,828
2001	82,691	76,424	86,064	89,024	93,074	90,239	85,442	79,854	83,160	90,153	93,780	83,595
2002	74,702	72,481	81,101	93,672	88,942	83,097	73,542					

Sources: Ministry of Agriculture, Forestry, & Fisheries 1989-2002
Hokkai Keizai Shinbun Sha 2002
Suisan Tsushin Sha 2002

SUPPLY

The annual supply of frozen surimi for the Japanese market and for export is comprised of the cold storage inventory on January 1, plus domestic production and imports. The annual supply reached a record high in 1986 due to sharply increased imports (Figure 4). Total annual supply decreased steadily from 1987 to 1991 because imports did not make up for decreased domestic production. In 2001, however, sharply increased imports of frozen surimi helped avert a large deficit in supply, as the production was at a 34-year low (Tables 1 and 9).

Between 1992 and 2001, annual frozen surimi supplies ranged between 502,000 and 567,000 mt, averaging 527,699 mt. During this period Japanese production averaged 143,921 mt per year, about 27 percent of the total supply. The January inventory averaged 113,714 mt (22 percent), and imports 270,699 mt (51 percent). The percentage of the market supplied by imports increased from 43 percent in 1992 to 61 percent in 2001.

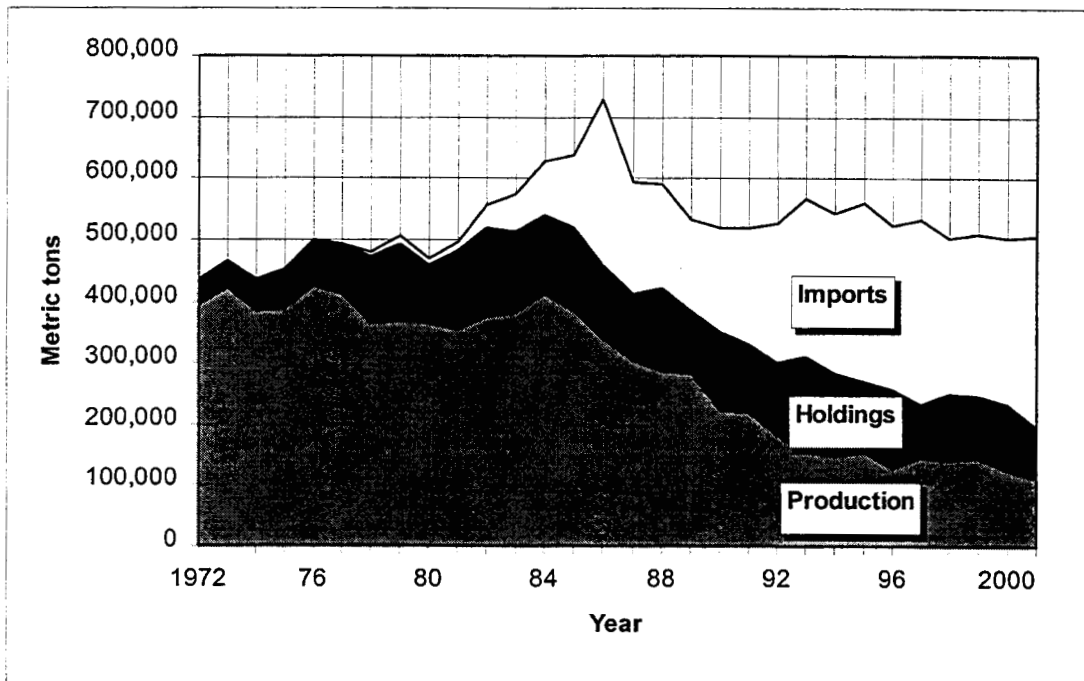


Figure 4. Japanese annual supply of frozen surimi , 1972-2001 (metric tons).

Sources: Japan Surimi Association 1984
Hokkai Keizai Sha 2002
Ministry of Agriculture, Forestry, & Fisheries 1974-2002; Suisan Tsushin Sha 2002; Minato Shinbun Sha 2002; Japan Fish Traders Association 1996-2002
Sonu 1986

DEMAND

Japanese demand of frozen surimi (supply minus exports and the cold storage inventory on December 31) was 418,977 mt in 2001, an increase of 2 percent compared with 2000 (Table 26). Between 1990 and 2001, annual demand of frozen surimi averaged 413,088 mt per year.

**Table 26. Japanese demand for frozen surimi, 1972-2001
(metric tons)**

Year	Supply	Exports	Inventory	Demand
1972	436,042	-*	43,000	393,042
1973	466,082	-	51,105	414,977
1974	435,405	603	65,000	369,802
1975	452,683	692	75,000	376,991
1976	499,233	489	80,483	418,261
1977	493,932	793	106,080	387,059
1978	480,642	661	124,735	355,246
1979	505,928	693	95,598	409,637
1980	469,190	709	127,384	341,097
1981	494,827	928	146,882	347,017
1982	556,116	1,276	134,834	420,006
1983	573,549	1,963	125,860	445,726
1984	629,265	2,580	133,481	493,204
1985	638,388	5,158	117,855	515,375
1986	730,731	6,676	108,708	615,347
1987	593,249	1,233	135,942	456,074
1988	590,087	887	129,289	459,911
1989	562,632	670	125,841	436,121
1990	521,484	784	109,832	410,868
1991	521,021	1,646	116,274	403,101
1992	526,515	1,579	155,369	369,567
1993	567,375	196	133,688	433,491
1994	544,090	1,324	114,010	428,756
1995	558,891	5,067	126,870	426,954
1996	521,945	4,648	89,025	428,272
1997	534,678	5,415	106,299	422,964
1998	502,158	1,724	99,615	400,819
1999	511,145	888	109,164	401,093
2000	503,574	4,552	86,828	412,194
2001	506,621	3,749	83,895	418,977

-*.....not available

Sources: Japan Surimi Association 1984
Hokkai Keizai Sha 2002
Ministry of Agriculture, Forestry, & Fisheries 1974-2002
Suisan Tsushin Sha 2002; Minato Shinbun Sha 2002
Sonu 1986
Japan Fish Traders Association 1996-2002
Japan Frozen Foods Inspection Corporation 1975-1988
Ministry of Finance 1988-2002
Sonu 1975-1991

MARKETS

Surimi is usually sold with a set price at consumer wholesale markets located in consumption areas, and at production wholesale markets located at Japanese ports of landings. Surimi is also sold directly to processors and representatives of supermarket chains. There are about 270 consumer and 340 production wholesale markets for fish and fishery products in Japan (Suisan sha 1993 and 1995). The largest consumer wholesale fish market is the Tokyo Central Wholesale Market. In 2001, this market handled about 718,000 mt of fish and fishery products valued at about \$5.1 billion (Tokyo Metropolitan Government 2002). It therefore plays an important role in providing indicators about supply and demand of fishery products in Japan. Wholesale prices at the Tokyo Central Wholesale Market generally serve as price indices for fishery products throughout the world.

Wholesale prices for surimi vary widely, depending on quality, origin, species, supply and demand, and other factors.

Tables 27-31 show monthly average wholesale prices of frozen surimi in Japan between 1987 and January-June 2002. Figures 5-9 compare monthly cold storage holdings and wholesale prices of surimi in Japan from 1987 through January-June 2002. Monthly average wholesale prices for frozen surimi fluctuated considerably during that period. The fluctuations were influenced mainly by the quantities in cold storage holdings; usually, the lower the cold storage holdings, the higher the prices and vice versa.

Wholesale prices for frozen surimi generally fall during summer. In 2002, however, summer prices did not decline, due to reduced imports and low levels of inventory of frozen surimi. Average wholesale prices of frozen surimi in June 2002 were up 8-19 percent from prices for December 2001 and 4-15 percent higher than prices for the same period in 2001. Japanese imports of Alaska pollock surimi decreased from 10,663 mt in June 2001 to 1,371 mt in June 2002 (Suisan Keizai Shimbun Sha 2002).

Figure 10 shows annual average wholesale prices of frozen surimi including all species and grades at 10 central wholesale markets in major cities in Japan between 1983 and January-June 2002, in comparison with annual average wholesale prices of Alaska pollock at 59 markets in major landing ports for the same period. The price trends of wholesale prices of frozen surimi at 10 major markets and wholesale prices of Alaska pollock at 59 markets in landing ports showed similar patterns. Informed sources cite price of Alaska pollock as an additional important factor affecting the price of surimi.

Table 27. Monthly average wholesale prices of frozen Alaska pollock surimi for on-shore processed, grade 2, 1987-2002 (yen/kg).

Year	Jan.	Feb.	March	April	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.
1987	230	230	230	240	235	230	230	220	220	210	210	200
1988	210	230	230	220	210	210	210	205	200	195	180	185
1989	195	190	195	195	200	205	205	205	200	200	200	210
1990	260	260	260	260	260	260	270	270	270	270	270	270
1991	320	380	500	510	510	500	520	520	520	520	520	500
1992	490	480	480	450	400	330	280	270	260	250	240	230
1993	250	280	280	280	280	280	270	270	260	250	240	230
1994	230	230	240	260	260	280	260	260	260	280	290	290
1995	290	290	290	290	290	290	290	280	280	270	260	250
1996	250	250	250	250	250	260	250	240	250	250	250	260
1997	270	280	300	320	330	340	340	340	340	320	300	290
1998	280	270	260	250	250	250	250	250	250	250	250	240
1999	240	240	240	240	240	240	240	240	240	200	180	180
2000	200	210	220	230	240	230	230	230	220	210	220	230
2001	220	220	220	230	230	240	240	240	240	240	240	250
2002	250	250	250	250	250	260	240	240	240	240	240	250

Sources: Minato Shinbun Sha 1987-2002

Table 28. Monthly average wholesale prices of frozen Alaska pollock surimi for off-shore processed, SA grade, 1987-2002 (yen/kg).

Year	Jan.	Feb.	March	April	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.
1987	480	480	480	480	480	480	480	480	480	480	480	480
1988	480	480	480	480	480	480	480	480	480	480	480	480
1989	480	480	480	480	477	470	470	470	470	470	470	460
1990	470	470	450	425	410	410	410	405	385	380	390	410
1991	420	477	560	620	620	620	670	690	750	800	800	830
1992	820	780	770	720	670	650	620	610	580	540	540	520
1993	500	470	450	450	450	430	390	380	370	370	360	350
1994	340	340	350	370	370	370	370	370	370	380	380	380
1995	370	380	380	400	400	400	400	380	370	350	350	350
1996	350	350	350	370	370	370	370	370	370	420	420	420
1997	420	420	420	450	450	460	460	460	460	440	440	420
1998	420	420	420	420	420	420	420	420	420	460	460	460
1999	450	450	470	470	470	460	450	450	450	420	410	400
2000	400	390	380	370	370	370	370	370	360	360	340	340
2001	330	330	330	340	340	350	360	360	360	360	360	360
2002	360	370	380	400	400	400	400	400	400	400	400	400

Sources: Minato Shinbun Sha 1987-2002

Table 29. Monthly average wholesale prices of frozen Alaska pollock surimi for off-shore processed, FA grade, 1987-2002 (yen/kg).

Year	Jan.	Feb.	March	April	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.
1991	390	430	520	590	600	600	650	660	720	760	760	780
1992	780	750	730	700	650	610	580	560	550	510	500	500
1993	450	400	400	400	400	390	370	350	320	320	320	320
1994	300	300	310	320	330	330	340	340	340	350	350	350
1995	350	350	350	370	370	370	370	360	350	330	320	330
1996	310	310	300	320	320	320	320	320	340	370	370	370
1997	370	390	390	430	430	440	440	440	440	420	420	400
1998	400	400	370	360	360	360	360	360	360	420	420	420
1999	420	420	450	450	440	400	400	400	400	380	360	360
2000	360	350	340	340	330	330	330	330	320	320	300	300
2001	290	280	280	300	310	320	320	320	320	320	320	330
2002	330	340	350	360	370	380						

Source: Minato Shinbun Sha 1992-2002

Table 30. Monthly average wholesale prices of frozen surimi* at 10 central wholesale markets in major cities in Japan, 1987-2002 (yen/kg).

Year	Jan.	Feb.	March	April	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.
1989	335	330	395	373	362	366	353	344	354	325	348	354
1990	349	348	355	349	351	339	320	333	313	335	337	344
1991	346	387	446	488	519	524	544	568	609	701	719	693
1992	683	624	591	541	576	555	504	438	443	438	445	415
1993	360	340	347	348	364	350	367	326	332	295	295	309
1994	322	315	309	302	311	320	309	316	310	319	333	357
1995	337	351	344	340	353	346	353	338	363	347	342	327
1996	334	319	314	330	303	342	334	286	308	302	335	321
1997	356	345	340	351	374	388	383	381	402	391	401	402
1998	389	339	354	337	329	339	333	328	313	313	319	334
1999	315	331	328	339	340	346	337	323	339	351	339	330
2000	321	312	298	307	303	297	304	275	289	276	286	294
2001	276	281	282	273	271	272	275	267	268	290	297	298
2002	301	299	303	299	311	317						

*.....includes all grades, all species of surimi

Sources: Ministry of Agriculture, Forestry and Fisheries 1991-2002
 Suisan Tsushin Sha, 2001, 2002
 Suishan Keizai Shinbun Sha 2001, 2002

Table 31. Monthly average wholesale prices of frozen Surimi* at Tokyo Central Wholesale Market, 1988-2001 (yen/kg).

Year	Jan.	Feb.	March	April	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.
1988	339	354	358	373	390	366	370	355	364	330	316	342
1989	336	330	355	390	373	353	372	334	357	354	377	366
1990	407	364	360	401	379	378	321	354	348	364	366	358
1991	379	400	487	527	579	576	622	640	697	745	754	761
1992	782	724	643	730	611	606	609	542	478	455	453	413
1993	387	337	352	349	367	308	338	345	340	328	333	337
1994	321	334	350	340	325	352	305	318	317	341	343	386
1995	449	358	387	361	451	378	349	373	377	394	372	350
1996	391	404	363	324	362	342	299	293	285	298	353	335
1997	369	374	385	383	392	410	368	371	397	430	414	391
1998	416	353	341	336	327	333	370	372	369	420	340	348
1999	399	435	345	336	368	366	369	313	391	348	383	333
2000	363	369	351	311	320	309	322	317	375	401	344	381
2001	331	307	292	274	287	257	292	262	301	284	259	289

*.....includes all grades, all species of surimi

Source: Tokyo Metropolitan Government 1989-2002

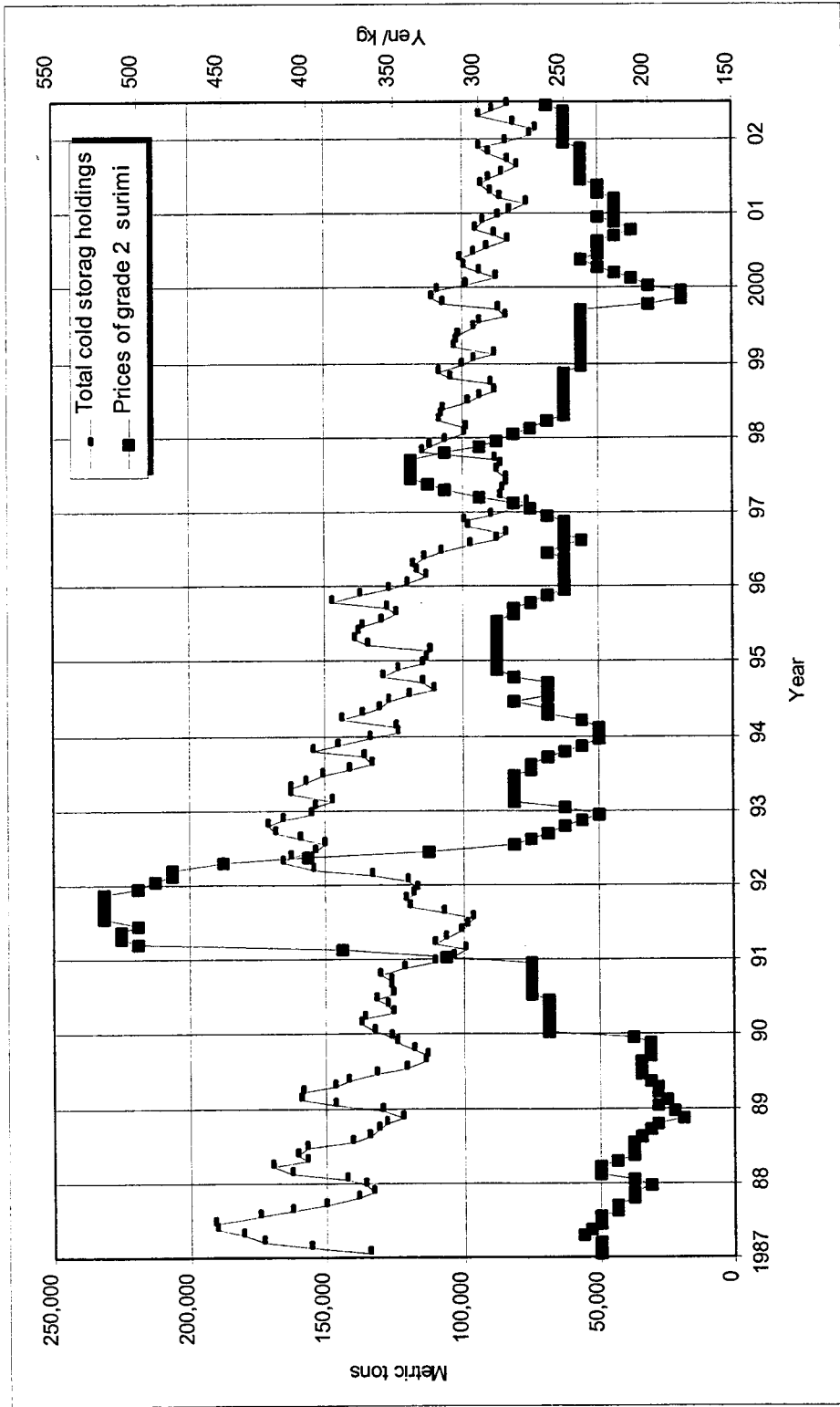


Figure 5. Monthly average wholesale prices of frozen Alaska pollock surimi for on-shore processed, grade 2 and monthly cold storage holdings of total frozen surimi in Japan, 1987-2002.

Sources: Ministry of Agriculture, Forestry, & Fisheries 1989-2002
 Hokkai Keizai Shinbun Sha 2002
 Suisan Tsushin Sha 2002
 Minato Shinbun Sha 1987-2002

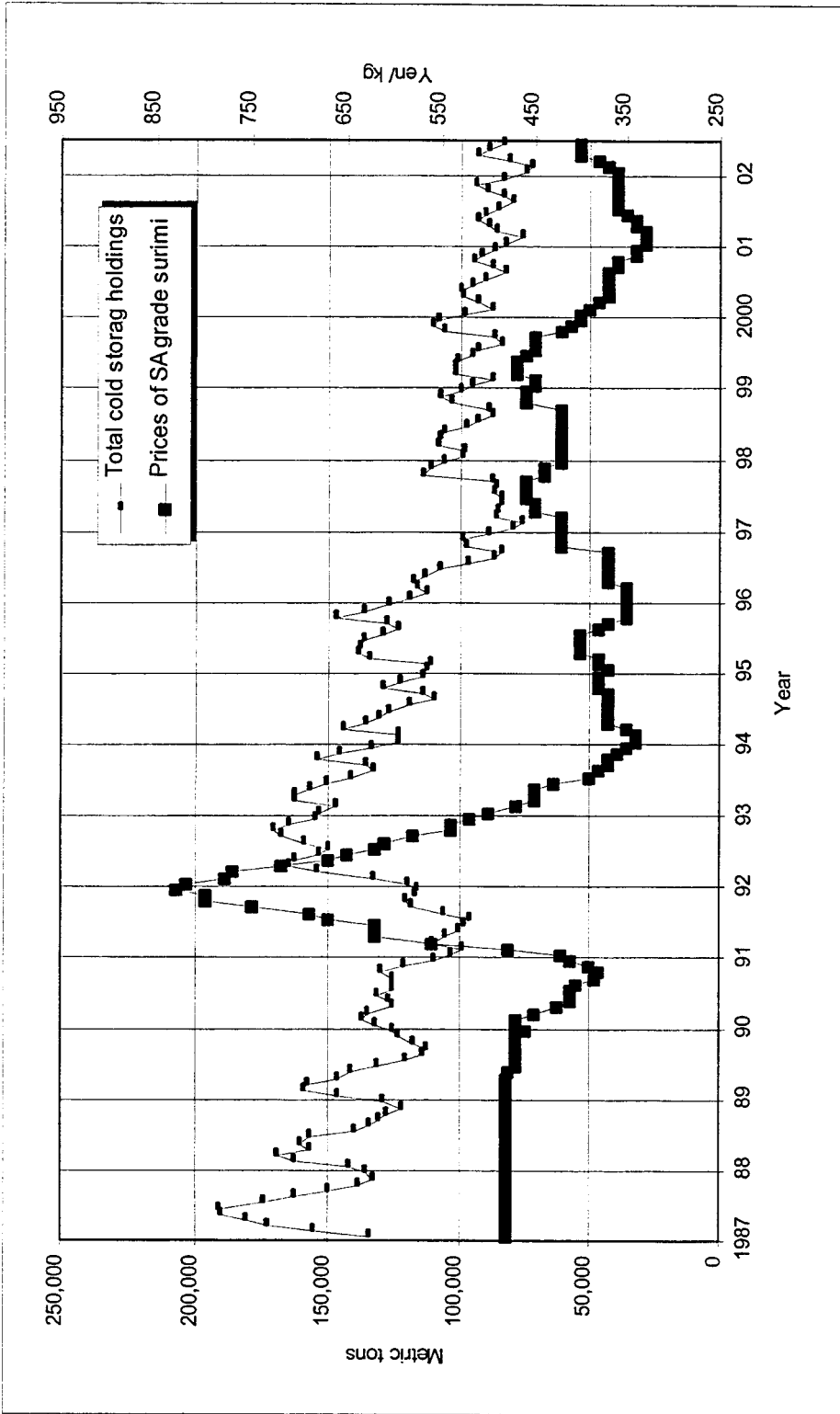


Figure 6. Monthly average wholesale prices of frozen Alaska pollock surimi for off-shore processed, SA grade and monthly cold storage holdings of total frozen surimi in Japan, 1987-2002.

Sources: Ministry of Agriculture, Forestry, & Fisheries 1989-2002
 Hokkai Keizai Shinbun Sha 2002
 Suisan Tsushin Sha 2002
 Minato Shinbun Sha 1987-2002

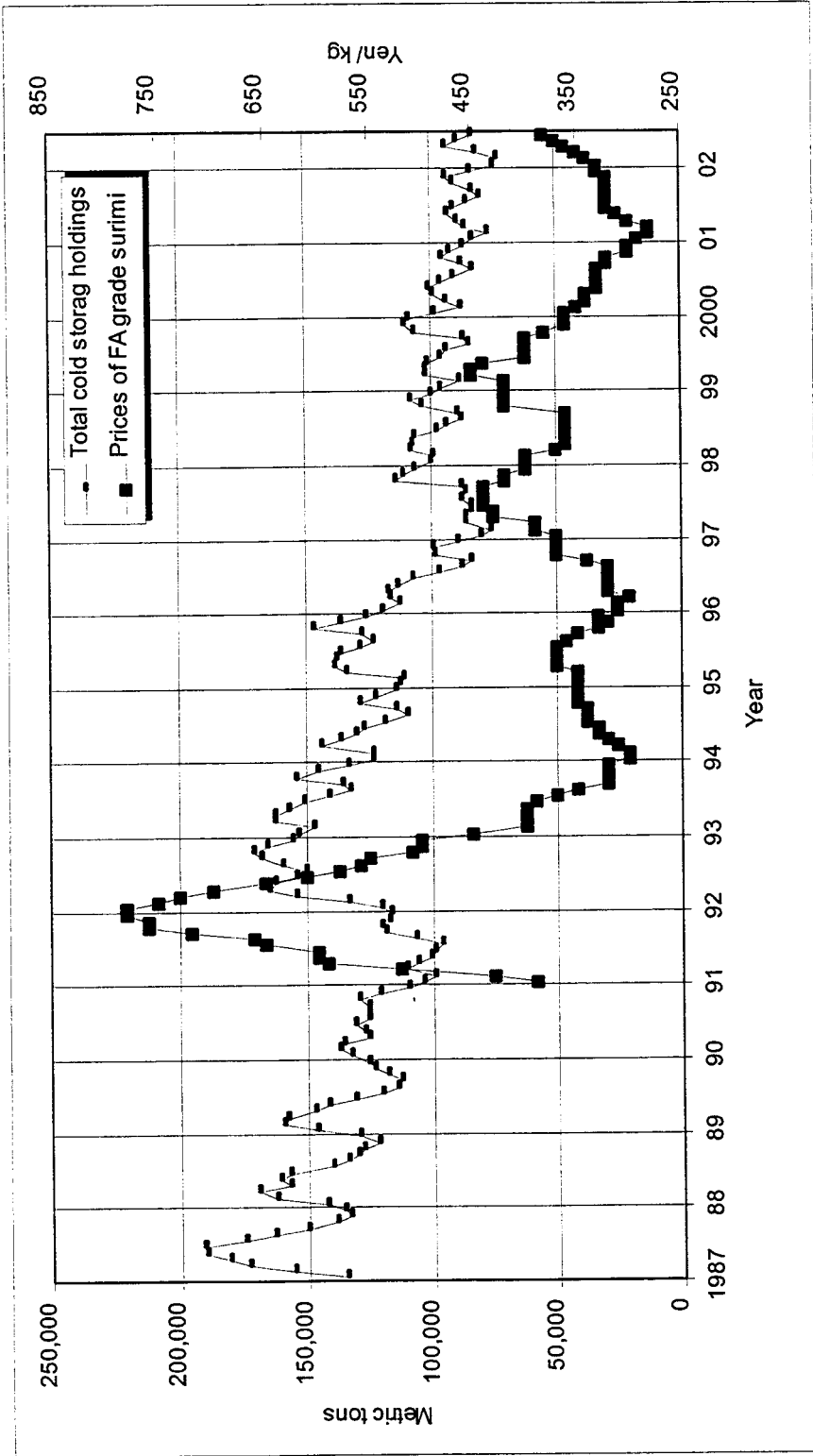


Figure 7. Monthly average wholesale prices of frozen Alaska pollock surimi for off-shore processed, FA grade and monthly cold storage holdings of total frozen surimi in Japan, 1987-2002.

Sources: Ministry of Agriculture, Forestry, & Fisheries 1989-2002
 Hokkai Keizai Shinbun Sha 2002
 Suisan Tsushin Sha 2002
 Minato Shinbun Sha 1987-2002

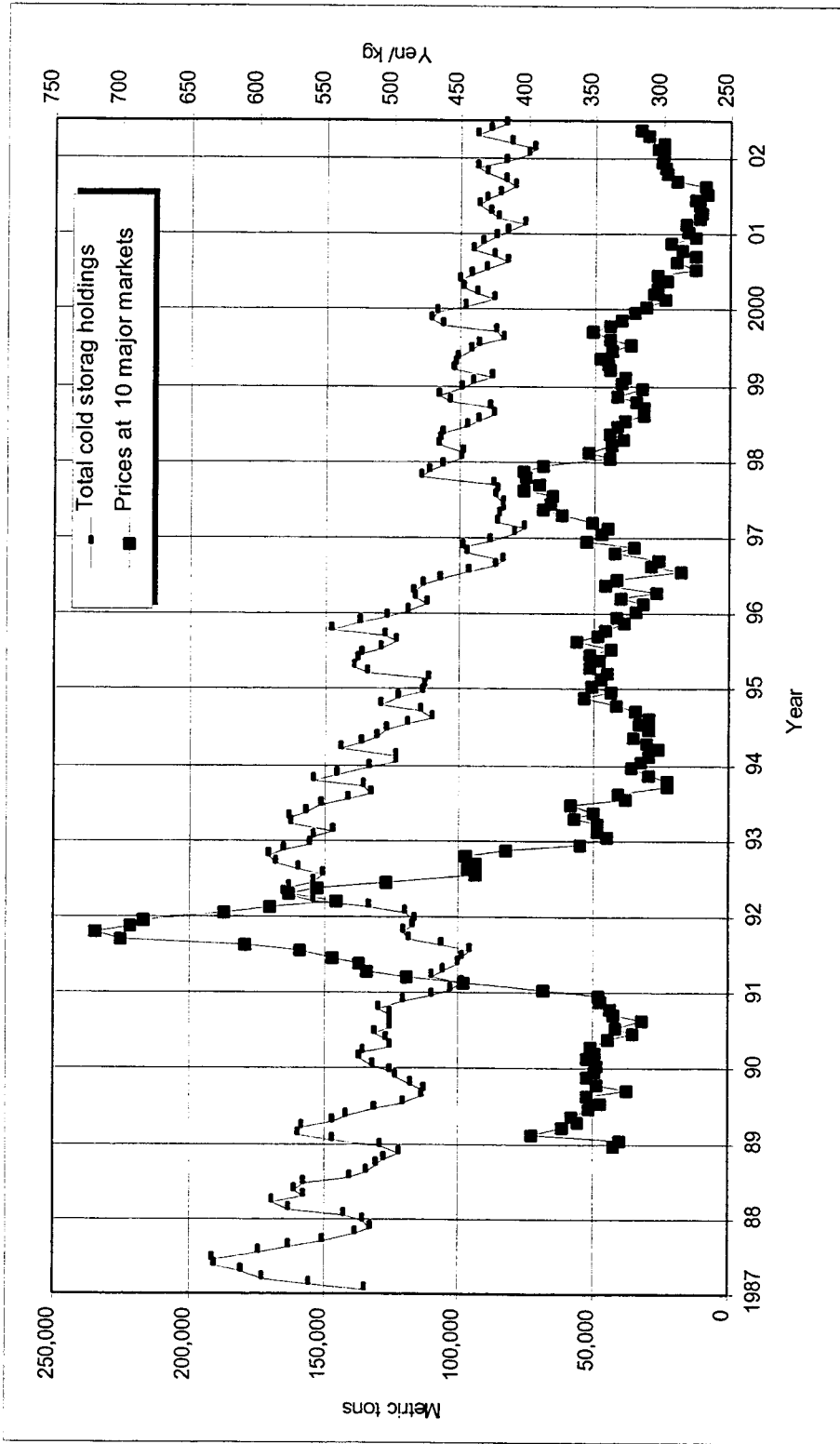


Figure 8. Monthly average wholesale prices of frozen surimi at 10 central wholesale markets in major cities in Japan and monthly cold storage holdings of total frozen surimi, 1987-2002.

Sources: Ministry of Agriculture, Forestry, & Fisheries 1989-2002
 Hokkai Keizai Shinbun Sha 2002
 Suisan Tsushin Sha 2001, 2002
 Suisan Keizai Shinbun Sha 2001, 2002

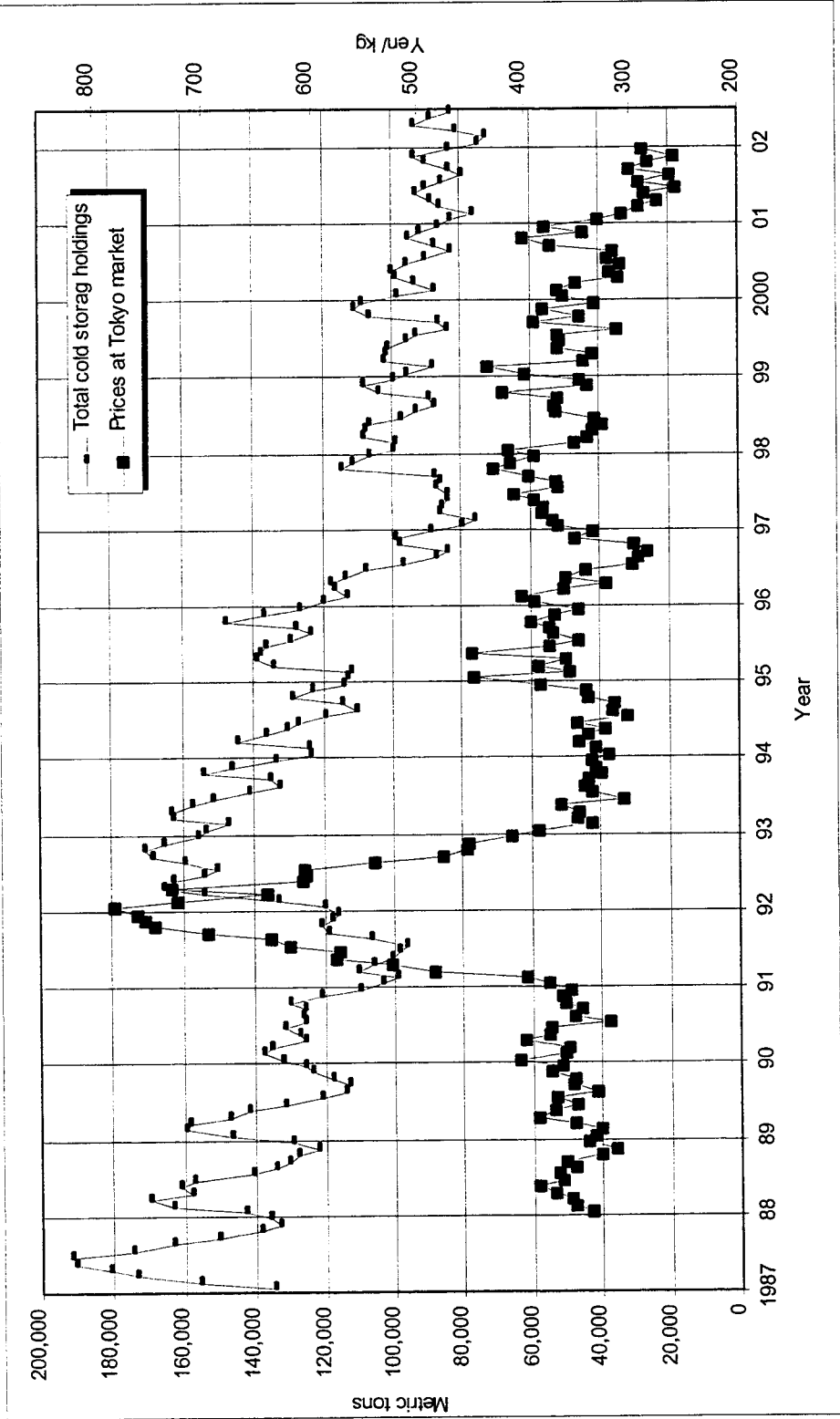


Figure 9. Monthly average wholesale prices of frozen Alaska pollock surimi at Tokyo Central Wholesale Market and monthly cold storage holdings of total frozen surimi in Japan, 1987-2002.

Sources: Ministry of Agriculture, Forestry, & Fisheries 1989-2002
 Hokkai Keizai Shinbun Sha 2002
 Suisan Tsushin Sha 2002
 Tokyo Metropolitan Government 1989-2002

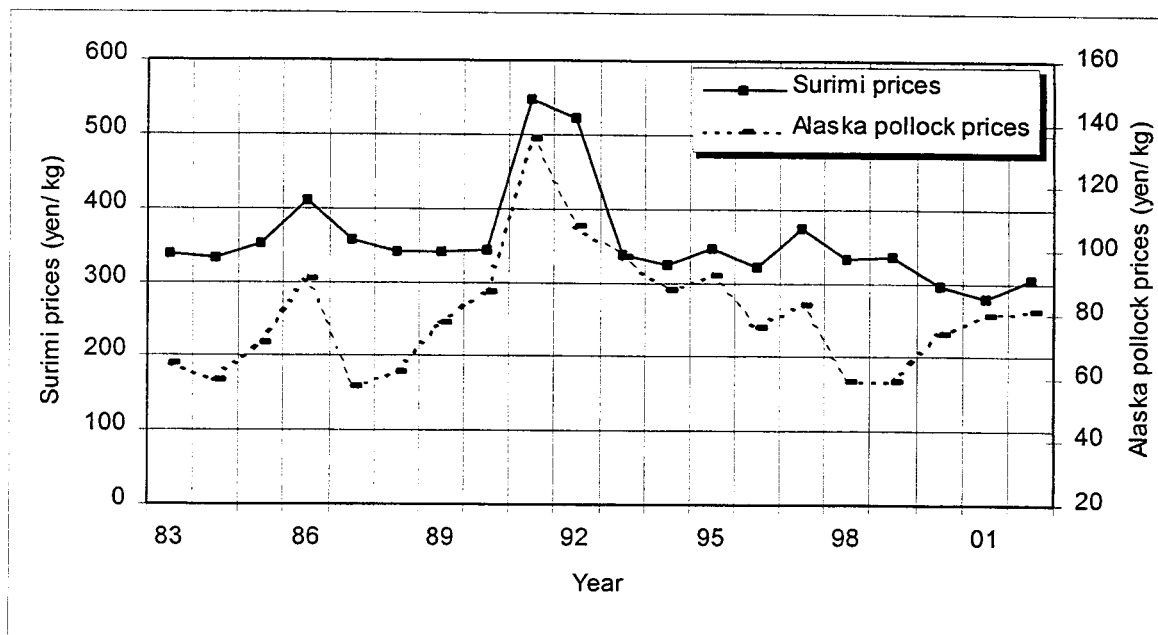


Figure 10. Annual average wholesale prices of surimi at 10 central wholesale markets in major cities and annual average wholesale prices of Alaska pollock at 59 markets in major landing ports in Japan, 1983-2002* (yen/kg)

2002*...January-June 2002

Sources: Ministry of Agriculture, Forestry and Fisheries
 1985-2002
 Suisan Tsushin Sha, 2001, 2002
 Suishan Keizai Shinbun Sha 2001, 2002

SURIMI-BASED PRODUCTS

For many centuries, the Japanese have practiced the art of manufacturing surimi-based products. Traditional methods consisted of processing the fish into raw surimi and then kneading it immediately into a finished product. Since both fish and raw surimi would denature quickly, the entire process had to be performed without much delay after the fish was landed (Okada 1981).

The advent of stable frozen surimi in 1960 revolutionized the traditional methods for making surimi-based products. With year-round availability of frozen surimi, manufacturers of surimi-based products were no longer dependent on unstable local fish catches and fresh surimi. The tremendous expansion of the surimi-base product industry was made possible by this important change.

The majority of surimi-based products, approximately 70 percent, is comprised of various types of fish cake called "kamaboko". About 30 percent of surimi-based products are represented by yaki-chikuwa (broiled surimi product), fish sausage, and fish ham (Table 32).

Kamaboko products are divided among three major categories: steamed kamaboko, fried kamaboko, and boiled kamaboko. Typical steamed kamaboko is called itatsuki (board-mounted) kamaboko, but the variety also includes imitation shellfish. Typical fried kamaboko (age-kamaboko) products are satuma-age and tempura. Typical boiled kamaboko is hampen, a spongy marshmallow-like product which contains entrapped air. Yaki-chikuwa is broiled surimi product which has the shape of a hollow bamboo stem.

In Table 32 the production of imitation crab meat has been listed under the category of "flavored" kamaboko only since 1987. Until that time, it was included in the category of "other kamaboko".

The main ingredient of surimi-based products is a homogeneous gel of ground fish muscle, obtained by kneading the thawed frozen surimi or raw surimi into a paste with salt. It also contains other ingredients such as sugar, starch, sweet sake, and monosodium glutamate.

Table 32 and figure 11 summarize annual production of surimi-based products by Japan since 1957. The production peaked at 1,185,100 mt in 1973, but decreased continuously, to 702,920 mt in 2001.

Table 32. Japan's Production of Surimi-based Products, 1957-2001, (metric tons).

Year	Kamaboko					Yaki-chikuwa	Fish ham/Sausage	Total
	In casings	Steamed	Fried	Boiled	Flavored			
1957	- *	-	-	-	-	-	35,895	434,152
1958	-	136,368	122,092	-	-	108,980	59,604	436,592
1959	-	149,762	141,221	-	-	107,650	71,516	476,229
1960	-	152,171	153,266	-	-	96,841	101,438	509,407
1961	-	187,965	155,700	-	-	98,230	123,681	573,445
1962	-	214,406	179,712	-	-	104,748	142,441	649,645
1963	-	205,144	196,437	-	-	112,564	158,666	688,054
1964	-	219,874	205,129	-	-	119,455	175,864	734,639
1965	-	245,116	234,004	-	-	121,774	188,094	797,178
1966	-	270,214	283,616	-	-	157,636	176,026	895,136
1967	-	294,782	267,549	-	-	171,745	164,431	911,887
1968	23,451	259,599	289,501	-	-	194,035	161,753	999,378
1969	23,078	283,917	319,191	61,021	-	204,290	168,778	1,077,190
1970	25,873	277,483	313,552	53,041	-	221,484	183,515	1,081,311
1971	31,500	291,927	322,161	56,387	-	238,539	180,207	1,127,105
1972	30,032	305,984	326,623	63,766	-	244,615	178,801	1,156,205
1973	32,039	317,423	329,692	75,595	-	249,172	179,586	1,185,100
1974	85,461	275,264	324,149	76,913	-	250,946	132,693	1,148,701
1975	90,786	271,683	327,068	84,519	-	258,882	120,708	1,154,970
1976	82,010	285,588	316,929	83,897	-	235,278	123,114	1,136,747
1977	77,651	266,216	303,224	84,304	-	214,393	125,088	1,086,962
1978	75,039	258,951	289,481	93,110	-	190,911	113,109	1,037,216
1979	73,827	252,035	272,175	76,558	-	177,192	106,815	976,191
1980	58,342	230,578	269,211	73,184	-	174,377	87,412	911,141

Table 32 (continued). Japan's Production of Surimi-based Products, 1957-2001
(metric tons).

Year	In casings	Kamaboko					Yaki-chikuwa	Fish ham/Sausage	Total
		Steamed	Fried	Boiled	Flavored	Others			
1981	57,832	227,694	291,412	74,051	-	25,350	180,678	91,865	948,882
1982	56,364	212,171	289,361	83,539	-	36,555	187,734	95,152	960,876
1983	60,545	195,120	297,257	-	-	150,220	194,931	98,098	996,171
1984	57,630	188,100	298,063	-	-	155,747	196,221	94,688	990,449
1985	57,329	184,340	290,979	-	-	158,977	199,861	92,279	983,765
1986	52,750	175,600	276,209	-	-	154,658	195,351	90,732	945,300
1987	57,990	170,952	271,488	59,797	68,952	18,311	189,297	89,146	925,933
1988	58,645	172,766	277,618	56,307	60,688	19,754	190,451	84,304	920,533
1989	63,226	169,784	273,563	55,152	58,011	26,037	184,713	85,345	915,831
1990	57,844	165,177	279,607	54,148	65,270	25,382	181,693	85,653	914,774
1991	57,647	155,619	270,459	49,991	59,321	27,604	174,735	78,331	873,707
1992	50,979	158,173	265,960	47,541	55,493	26,719	169,607	70,884	845,356
1993	48,035	146,271	264,952	47,487	57,424	26,194	172,579	66,828	829,770
1994	44,268	142,218	265,346	45,918	59,365	26,153	173,445	66,059	822,772
1995	42,693	135,633	258,698	44,837	59,036	24,264	169,559	66,196	800,916
1996	38,443	132,743	258,927	43,818	58,136	26,139	166,940	65,285	790,431
1997	35,454	129,703	258,110	44,333	26,544	23,668	259,807	65,282	772,901
1998	35,419	125,648	252,899	42,445	52,292	18,874	164,066	62,816	754,459
1999	33,648	119,773	235,835	38,213	50,980	16,115	159,848	62,306	716,718
2000	34,701	119,950	232,121	40,394	50,451	15,404	153,285	60,286	706,592
2001	34,472	117,740	230,658	41,779	50,591	19,061	145,962	62,657	702,920

-*not available

Sources: National Surimi Association 1984
Ministry of Agriculture, Forestry and Fisheries 1959-2001
Suisan Tsushin Sha 2001, 2002

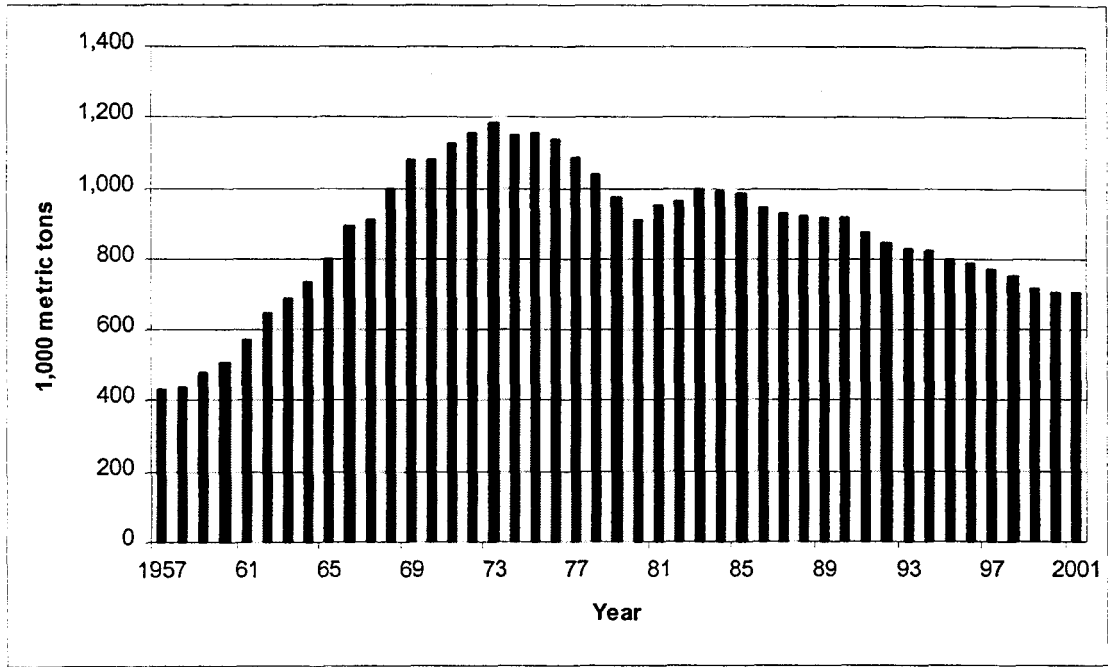


Figure 11. Japanese Production of Surimi-based Products (1,000 metric tons), 1957-2001.

Sources: National Surimi Association 1984
 Ministry of Agriculture, Forestry and Fisheries
 1959-2001
 Suisan Tsushin Sha June 27, 2001

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Appendix 1. Japanese Surimi Importers with Import Quota

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FAX: 81-3-3593-0685

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COMPANY: Beniko K.K.
ADDRESS: 2-14-8 Ginza, Chuo-ku, Tokyo 104-0061

COMPANY: C and C, K.K.
ADDRESS: 3-11-12 Shinjuku, Shinjuku-ku, Tokyo

COMPANY: Chosen Sangyo K.K.
ADDRESS: 1-2-17 Higashi-shimbashi, Minato-ku, Tokyo

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FAX: 81-3-5778-8160
E MAIL: katsuyoshi.zenbutsu@jccu.coop

COMPANY: Daido Boeki Koshi, K.K.
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COMPANY: Daiei
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COMPANY: Daimaru Kogyo Ltd., Agricultural & Marine Products Dept.
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COMPANY: Dairoku, K.K.
ADDRESS: 1-1-12 Minato, Chuo-ku, Tokyo

COMPANY: Daitoh Koun K.K.
ADDRESS: 3-7-9 Shibaura, Minato-ku, Tokyo

COMPANY: Direct, K.K.
ADDRESS: 2-11-10 Tsukiji, Chuo-ku, Tokyo

COMPANY: Eastern Products Co., Ltd.
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COMPANY: Esashi Gyogyo K.K.
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COMPANY: Eyu, K.K.
ADDRESS: 5-12-1 Shimbashi, Minato-ku, Tokyo

COMPANY: FIT Trading Co., Ltd.
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FAX: 81-78-453-4324
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COMPANY: Hayakawa Tsusho
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COMPANY: Henderson Trippe K.K.
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FAX: 81-3-3271-2922

COMPANY: Hinomaru Sangyo K.K.
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COMPANY: Hiroshima Trading Co., Ltd.
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COMPANY: Hohsui Coporation
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FAX: 81-3-3297-8205
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WEB SITE: <http://www.hohsui.co.jp/>

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CONTACT: Mr. Koichi Yamamoto
PHONE: 81-3-3546-1261
FAX: 81-3-35461260

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FAX: 81-3-3545-2167

COMPANY: Hokuyo Kyodo Gyogyo K.K.
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FAX: 81-3-3508-1445

COMPANY: Honami Bussan Co., Ltd.
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FAX: 81-832-66-2181

COMPANY: Honda Trading, K.K.
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COMPANY: Ihara & Co., Ltd.
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FAX: 81-164-43-4707
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COMPANY: Japan Food K.K.
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COMPANY: JALUX, K.K.
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CONTACT: Mr. Koji Yagi, Nosuisan-bu
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COMPANY: Jissho Nakata, K.K.
ADDRESS: 2-17 Iriecho, Shimonoseki, Yamaguchi

COMPANY: Kaiyo Boeki K.K.
ADDRESS: 2-201 Yokogawa, Kanazawa, Ishikawa

COMPANY: Kakoren Ltd.
ADDRESS: Mainichi Bldg. 8F, Nishi 6, Kita 4-jo, Chuo-ku
Sapporo, Hokkaido 060-0004
PHONE: 81-11-241-0101
FAX: 81-11-221-1628

COMPANY: Kanbe Ltd.
ADDRESS: 7-13-5 Tsukiji, Chuo-ku, Tokyo

COMPANY: Kanematsu K.K.
ADDRESS: 2-1 Narayacho, Hakata-ku, Fukuoka, Fukuoka

COMPANY: Kaneshin Suisan, K.K.
ADDRESS: 4-10-5 Tsukiji, Chuo-ku, Tokyo

COMPANY: Kankoku Katsugyo Yunyu Hanbai Kyodo Kumiai
ADDRESS: Dainichi Suisan Bldg., 2-1-2 Kajiyacho, Hyogo-ku
Kobe, Hyogo

COMPANY: Kawaei Shokai Co., Ltd.
ADDRESS: 1-16-2 Yamatomachi, Shimonoseki, Yamaguchi 750
PHONE: 81-832-66-7557
FAX: 81-832-66-7557

COMPANY: Kawamoto Shoji Co., Ltd.
ADDRESS: 1-10-13 Yamatomachi, Shimonoseki, Yamaguchi 750-0067
PHONE: 81-832-67-1321
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COMPANY: Kibun Shoji, K.K.
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COMPANY: Kibun Shokuhin, K.K.
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COMPANY: Kinnan Shoji K.K.
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COMPANY: Kita Borneo Suisan K.K.
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COMPANY: Kobe Yoko Ltd.
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CONTACT: Mr. Takamasa Ohashi
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COMPANY: Kodaira, K.K.
ADDRESS: 4-48-9 Shimoarata, Kagoshima, Kagoshima

COMPANY: Kohyo Co., Ltd.
ADDRESS: 5-4-19 Shinsei, Yokkaichi-shi, Mie 510-0064
CONTACT: Mr. Shintaro Hayashi, Director, Business Dept.
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COMPANY: Koike Industries
ADDRESS: 3-4-22 Sakanamachi, Ishinomaki, Miyagi 986-0022
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FAX: 81-225-94-9435
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COMPANY: Kokusai Shoji K.K.
ADDRESS: 1-3-8 Yaesu, Chuo-ku, Tokyo

COMPANY: Kongo Bussan Co., Ltd.
ADDRESS: 3-14-4 Kosei, Minato-ku, Osaka, Osaka 552

COMPANY: Kosei Trading Ltd.
ADDRESS: Togeiki Bldg., 4-1-1 Tsukiji, Chuo-ku, Tokyo 104-0045

COMPANY: Kotake Tsusho K.K.
ADDRESS: 2-15-13 Tsukiji, Chuo-ku, Tokyo

COMPANY: Kyodo Agri-Marine MFG. Ltd.
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COMPANY: Kyoritsu Shoji Co., Ltd.
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COMPANY: Kyowa Suisan K.K.
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COMPANY: Kyushu Kaisan, K.K.
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COMPANY: Leaf Shoji K.K.
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COMPANY: Marubeni Corporation, Marine Products Dept
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COMPANY: Marugen Marinefoods Co., Ltd.
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CONTACT: Mr. Toru Fujisawa, President
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COMPANY: Marukin Sangyo K.K.
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COMPANY: Marusen Shoji, K.K.
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COMPANY: Marutaka Co., Ltd. (Shimonoseki)
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COMPANY: Maruyoshi, K.K.
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Fukuoka

COMPANY: Masumine Tsusho K.K.
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COMPANY: Matsuda Sangyo K.K.
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COMPANY: Matsuoka Co., Ltd.
ADDRESS: 1-10-12 Higashi-yamatomachi, Shimonoseki, Yamaguchi
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COMPANY: Matsuyama Co., Ltd. (Shimonoseki
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FAX: 81-832-34-4138

COMPANY: Meika Trading Co., Ltd.
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COMPANY: Miei Bussan K.K.
ADDRESS: 9-20 Nakashimacho, Nishinomiya, Hyogo

COMPANY: Mineichi Suisan, K.K.
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COMPANY: Mitsubishi Corporation, Marine Products Dept.
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CONTACT: Mr. Mikio Sasaki, President
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WEB SITE: <http://www.mitsubishi.co.jp/>

COMPANY: Mitsui & Co., Ltd., Marine Prod. Div.
ADDRESS: 1-2-1 Ohtenachi, Chiyoda-ku, Tokyo 100-0004
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Web Site: <http://www.mitsui.co.jp/>

COMPANY: MK, K.K.
ADDRESS: 3-3-3 Irifune, Chuo-ku, Tokyo

COMPANY: Momokawa Co.
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CONTACT: Mr. Keiji Momokawa, President
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COMPANY: Morikawa Shoji K.K.
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COMPANY: Nagae, K.K.
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COMPANY: Natsuyama Shokai, K.K.
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COMPANY: New Asia Trading Co., Ltd.
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COMPANY: Nichiboren K.K.
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COMPANY: Nichimo Co., Ltd., Food Business Department
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COMPANY: Nichirei Corporation, Marine Products Division
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COMPANY: Nichiryo, K.K.
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COMPANY: Niki Corporation
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COMPANY: Niki Shoji
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COMPANY: Nikkan Suisanbutsu-boeki Kyodo Kumiai
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COMPANY: Nippon Samsung K.K.
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COMPANY: Nippon Suisan Kaisha, Ltd.
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COMPANY: Nipporos Corporation
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CONTACT: Mr. Katsuhiro Yoshizumi, President
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COMPANY: Nissei Kosan
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COMPANY: Nogami Shoten
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COMPANY: Nomura Trading Co., Ltd., Food Business Unit
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COMPANY: Northern Trading, K.K.
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COMPANY: Okinawa Free Zone Foods, K.K.
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COMPANY: Otake Ooru K.K.
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COMPANY: Rasa Corporation
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COMPANY: Royal Greenland Japan Ltd.
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COMPANY: Ryushoko K.K.
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COMPANY: Samon Tsusho K.K.
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COMPANY: Sanei Shokuhin
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COMPANY: Sankei Suisan K.K.
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COMPANY: Sanko Kaisanbutsu K.K.
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COMPANY: Sanyo Trading Co., Ltd.
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FAX: 81-3-3233-4158

COMPANY: Shin Ajia Boeki K.K.
ADDRESS: 3-3-9-301 Senbachuo, Chuo-ku, Osaka, Osaka

COMPANY: Shin Nihon Global Inc
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COMPANY: Shin Tokyo International Inc.
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COMPANY: Shinko Shoji, K.K.
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COMPANY: Shinko, K.K.
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COMPANY: Shinmei Jitsugyo K.K.
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COMPANY: Shinten, K.K.
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COMPANY: Shinto Corporation
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COMPANY: Shinyei Kaisha
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COMPANY: SK Group Japan K.K.
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COMPANY: Sueyoshi Corporation, K.K.
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COMPANY: Sumitomo Corporation (SC Foods Co., Ltd.)
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Chiyoda-ku, Tokyo 101-0054
CONTACT: Mr. Shin Matsumoto, President
PHONE: 81-3-3219-3030
FAX: 81-3-3219-3045
WEB SITE: <http://www.scgourmet.co.jp>

COMPANY: Sunland Corp.
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CONTACT: Mr. Akiyoshi Okubo, President
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COMPANY: Taito Seiko Co., Ltd.
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COMPANY: Taiyo Shokuhin K.K. (Yokohama)
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Nihonbashi-kayabacho, Chuo-ku, Tokyo 103-0025

COMPANY: Takeichi & Co., Ltd.
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COMPANY: Takuto Tsusho
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COMPANY: Tin Hon, K.K.
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COMPANY: Tohei Shokai, K.K.
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Chuo-ku, Tokyo

COMPANY: Toho Bussan Kaisha, Ltd., Food Stuff Div.,
Marine-Products Team
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COMPANY: Toka Boeki K.K.
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COMPANY: Tokai Suisan Trading Co., Ltd.
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COMPANY: Toko Industrial Co., Ltd.
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COMPANY: Tokyo Commercial Co., Ltd.
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COMPANY: Tomei Fruits Co., Ltd.
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COMPANY: Tomen Corporation, Marine Product Dept.
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WEB SITE: <http://www.tomen.co.jp/>

COMPANY: Tosan Gyogyo K.K.
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COMPANY: Tosho Co., Ltd.
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COMPANY: Toyokawa, K.K.
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COMPANY: Toyota Tsusho Corporation, Foods Dept. 2
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COMPANY: Tsukiji Suisan, K.K.
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COMPANY: Tsukiji Toyo K.K.
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COMPANY: Umada Boeki K.K.
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COMPANY: Umimar, K.K.
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COMPANY: Unicoop Japan (Kumiai Boeki, K.K.)
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COMPANY: Union Foods K.K.
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COMPANY: Unique Trading K.K.
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COMPANY: Yamasaki, K.K.
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COMPANY: Yamawaki Shoten, K.K.
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COMPANY: Yazawa Trading, K.K.
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COMPANY: Yokohama Tsusho K.K.
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COMPANY: Zensui Co., Ltd.
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Source: U.S. Embassy, Fisheries Commercial Service Section,
Tokyo, Japan 2002