Japan Market Summary & Category Data for Fish & Seafood - Cod

Seafood Industry Australia
The Voice of Australian Seafood

GREAT AUSTRALIAN SEAFOOD

About Seafood Industry Australia

Seafood Industry Australia (SIA) is the national peak-body representing the Australian seafood industry as a whole. With members from the wildcatch, aquaculture and post-harvest sectors of the Australian seafood industry, we are the voice of Australian seafood.

SIA provides consumers, Government and other stakeholders with confident and united representation. Our unity indicates that we love what we do, we stand by our products and that those products are the best in the world.

SIA provides services identified through a process involving member input to fill a critical gap that currently exists, to have more influence on Government decisions, to act as a national industry voice, to be a marketing and communications hub, and to remove obstacles to growth standing in the way of the Australian seafood industry.

Our vision is for the Australian seafood industry to be United, Effective and Respected.

Our mission is to Promote, Protect and Develop the Australian seafood industry on the national and international level.

Agricultural Trade and Market Access Cooperation (ATMAC) Program

The ATMAC program is an Australian Government initiative, expanding trade in Australian agricultural, forestry and fisheries sectors into emerging export markets and/or export markets with high-growth potential. This will be achieved through support for diversification efforts that align with industry priorities.

Seafood Industry Australia's 'marketing, market access and export development for the Australian seafood industry' was funded under the ATMAC Program.

Economic Indicators

- GDP (USD Billion): **4,893.64**
- GDP per capita (USD): **39,048**
- Currency: **Yen** (JPY)
- Exchange Rate: **JPY = 0.012 AUD** (19/1/2022)
- Mercer's 2019 Quality of Living Ranking (2020 not released due to COVID): Kobe - **49th**, Tokyo - **49th**, Yokohama - **55th**, Osaka - **58th**, Nagoya - **62nd**
- Human Development Index: **0.919** and ranked **19th**
- Logistics Performance Index: **4.03** and ranked **5th**
- Ease of Doing Business Rankings: **29th**

Source: Trading Economics, World Bank, Mercer

- **Trade Agreements:**
  - Japan currently has 31 Bilateral Investment Treaties (BITs) and 19 Treaties with Investment Provisions (TIPs) in force.
  - The Japan-Australia Economic Partnership Agreement (JAEPA) has been in force for over five years and provides preferential treatment for Australian exports to Japan. The agreement creates the most liberalised trade partnership that Japan has ever been a party to.
  - The Japanese government was instrumental in creating the Comprehensive and Progressive Agreement for Trans-Pacific Partnership (CPTPP) that came into force in late 2018 and allows for increased free trade amongst 11 Asia-Pacific nations, including Australia.

Source: https://investmentpolicy.unctad.org/country-navigator

Demographic Indicators

- Total Population (million): **126.17**
- Expatriate Population (million): **2.33**
- Population Growth: **-0.22%**
- Median Age: **48.4**
- Urban Population: **91.8%**

- **Population Ethnicity:**
  - Japanese 98.1%
  - Chinese 0.5%
  - Korean 0.4%
  - Other (includes Filipino, Brazilian) 1%

- **Dominant Religious Groups:**
  - Non-religious 62%
  - Buddhism 31%
  - Shintoism 3%
  - Christianity 1%

Source: Trading Economics, World Bank, Statistics Body for individual countries

Consumer Behaviour & Societal Trends

Key Trends:

- Due to financial burdens placed upon the Japanese population, especially millennials and younger generations, as a result of COVID-19, the historically-strong Japanese preference for choosing quality over mass consumption has faded as lower-quality and discount products are gaining market share.
- Customer service quality expectations are extremely high in Japan and relate to not only the in-store service received when purchasing a product, but also the product’s physical components and after-sale service.
- Japanese spending on Food & Beverage (non-alcoholic) products is very high as a portion of household consumption, at around 15%.
- Japan’s increasingly ageing population continues to spur rapid growth in sales of Food & Beverage products loaded with health and wellness perks. Examples include drinks infused with probiotics and snacks with added collagen.
- The downturn in sales for foodservice businesses due to the COVID-19 pandemic has led many restaurants to increasingly offer breakfast options, which have been embraced by the Japanese population which has historically much-preferred breakfast at home. Also being increasingly demanded by Japanese consumers for breakfast are foods traditionally eaten at dinner such as sushi and ramen.
- Japanese consumers, especially the older population segments that comprise the majority of the market, possess relatively high brand loyalty qualities, even more so if the brand is constantly innovating in terms of itsproduct range.
- Over 50% of Japanese consumers are more concerned about the environment compared to 2019, however, the premium mark-up often associated with the prices of sustainable Food & Beverage products renders these still relatively unpopular.

- Japanese consumers are much less optimistic about COVID-19 recovery prospects and almost one-fifth of the population believes that, even after the pandemic, they would continue to spend more through online channels, as the effect on personal routines is forecast to outlast that on personal finances.

- Japanese consumers are becoming more experimental with their purchasing behaviours as a result of the general uncertainty created by the COVID-19 pandemic. Approximately a third of surveyed consumers reported having discovered a new shopping method and being very keen to continue with it.

Source: Santandertrade, Japan Times, McKinsey, Food Navigator

Digital Adoption:

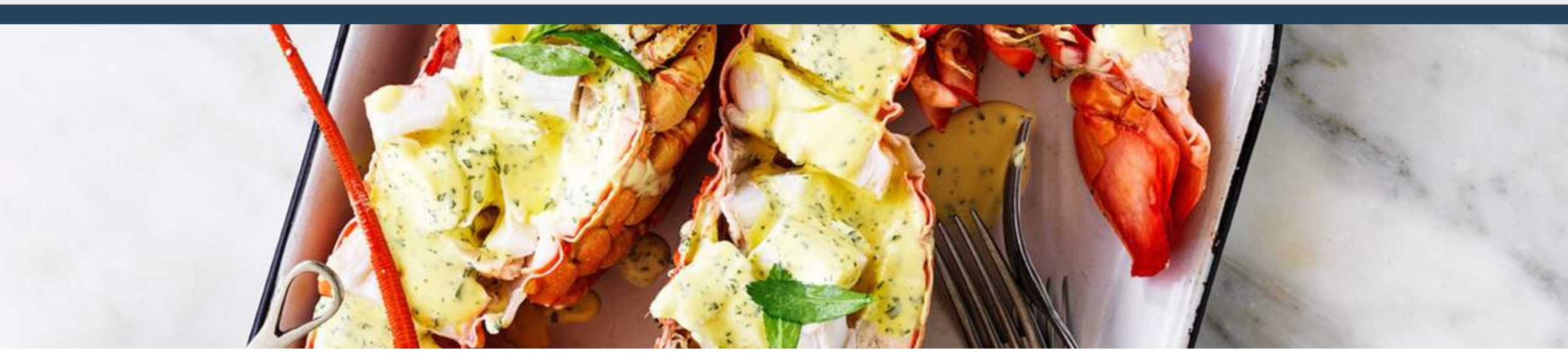
- The Japanese population spends 45 minutes a day, on average, on social media and nearly 4 and a half hours a day on the internet.

- Japanese consumers are very open to using social media channels to inform their decisions, as the majority believe that first and foremost, data collection by these tech giants allows for product recommendations tailored towards their specific needs. Hence, nearly three-quarters of the Japanese population inquire through social media before making certain purchases, with much of this influence coming from YouTube videos by “influencers”.

- There are approximately 116.5 million internet users with a penetration rate of 92%.

- The most visited website is google.com, followed by yahoo.co.jp and then youtube.com.

Source: Digital in 2020 Report



Grocery Retail Channel Developments

Key Trends:

- Japan is one of the most valuable grocery markets in the world, worth approximately $US466 billion a year with Japanese consumers ranked 4th globally for grocery purchases per capita.
- The grocery retail sales market share of traditional grocery retailers has suffered increasingly over the last decade as convenience stores, supermarkets, and hypermarkets all simultaneously encroach on traditional retailers' popularity as a destination for grocery purchases.
- Like most of the world in the midst of the pandemic, spending on essential goods as a portion of expenditure has grown greatly, and consequently so has the sales volume of grocery products.
- With the Japanese population increasingly urbanising within certain districts, major shopping centres are rising in prominence and consequently, the ability of traditional grocery retailers to capture this geographically-mobile market segment has fallen.
- The traditional grocery retailers market is very fragmented, and consequently, these smaller, independent retailers usually have a very small market share in their respective areas. However, alcoholic drinks producer Yamaya has bucked the trend with large sales growth due to the home drinking trend, which is rising as Japanese people now spend much more time at their residences.
- Groceries that have a longer shelf life and are in locations where they can be very conveniently purchased (e.g. convenience stores) are progressively faring much better than less-durable products, leading major convenience stores like 7-Eleven to prioritize selling frozen and sealed pouch goods.
- The ageing population of Japan has necessitated more accessible grocery shopping methods, illustrated by the doubling of internet sales for groceries between 2019 and 2020 from 2.5% of total grocery sales to 5%. Also becoming influential are grocery trucks, whereby groceries are sold from a truck that is parked in areas with large foot traffic.

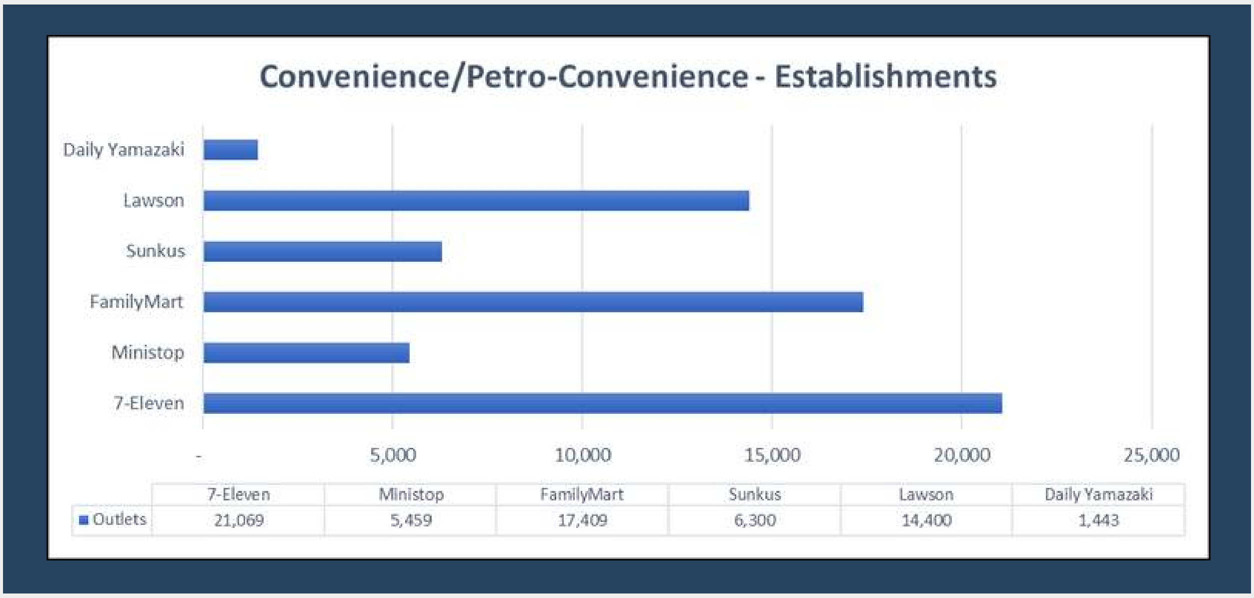
- Hypermarket retailers that operate 24/7 and have high-tech warehouses, such as Seiyu, have benefited the most from the trend towards demand for online grocery deliveries.

- Supermarkets dominate the grocery retail channel and have experienced higher growth due to the COVID-19 pandemic, with sales rising 2.6% from July 2019 to July 2020 after a fall between 2018 and 2019. Much of the increased growth came from food as same-store food sales grew 5% from 2019 to 2020.

- The improvement in demand amongst grocery products is largely concentrated in fresh fruit and vegetables, while other segments such as deli food have seen a reduction in purchase value since the COVID-19 pandemic began.

Grocery Retailing Brand Outlets:

Convenience/Petro-Convenience Brand Outlets:



Source: Euromonitor, SeafoodSource, Japan Times, Nikkei Asia

Foodservice Channel Developments

Key Trends:

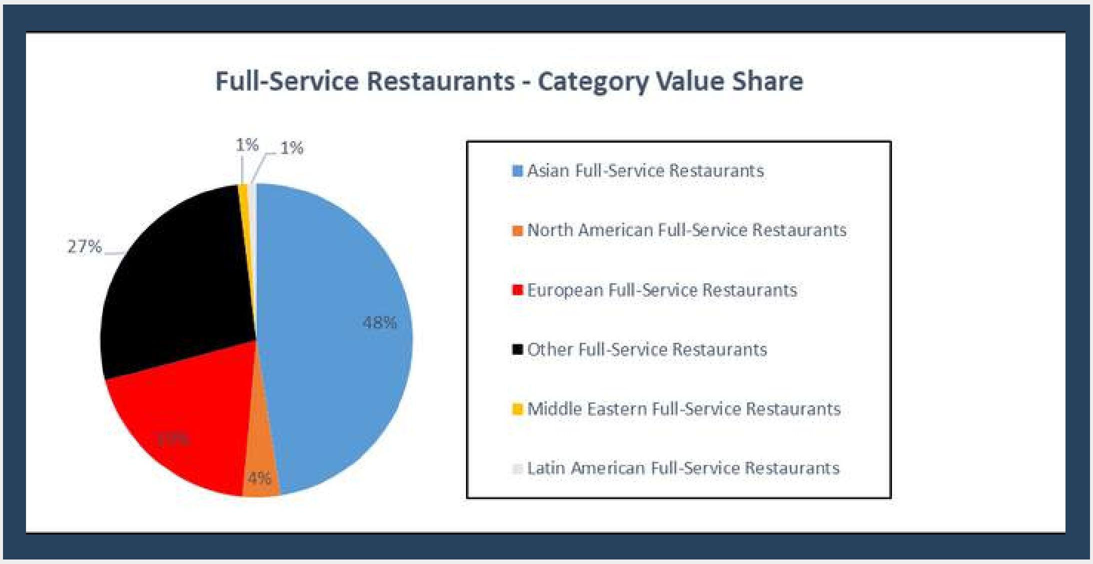
- The trend towards eating at home was not only exacerbated by the COVID-19 pandemic, but also by an increase in the VAT from 8% to 10% at the end of 2019 and Japanese government measures that aim to encourage more cashless payments.
- Business conditions for independent foodservice operators were poor throughout 2019 due to the rising cost of ingredients and a shrinking labour base exacerbated by an ageing population. Due to the COVID-19 pandemic, the situation has worsened dramatically and many, mostly full-service independent restaurants, have been forced to close as foot traffic dropped greatly across Japan.
- The most successful foodservice businesses in recent years have offered new menus with innovative product items and partnered with delivery businesses operating through the internet, the likes of which have also seen positive business prospects. In particular, Demae-Can has partnered with over 20,000 restaurants nationwide and primarily utilises messaging app LINE to secure a growing customer base.
- The biggest limited-service restaurants are all convenience store chains, which have over 50,000 outlets across the island nation. This is mainly due to the fact that these chains can offer many of the same services found in other limited-service restaurants such as making ice-creams and sandwiches on-demand yet in a much more accessible and prompt manner.
- Japan is ranked first in the world for ice-cream innovation, responsible for 1 in 10 global product launches in 2019. Many of these reflect the relatively high desire for wellness products, as vegan and protein ingredients feature heavily in the catalogue of innovations.
- While eating from home has increased greatly in popularity since the COVID-19 pandemic began, products that enable quicker meal preparation such as frozen ready-to-eat (RTE) meals and certain cooking sauces have seen high annual growth in sales volumes.

- Fast food chains successfully add value to customer experiences by frequently launching menu items tailored to specific times of the day or year. This is seen in McDonald's' "Night Mac" and the KFC Christmas Chicken Boxes, the latter of which are purchased by over 3 and a half million Japanese families every Christmas.

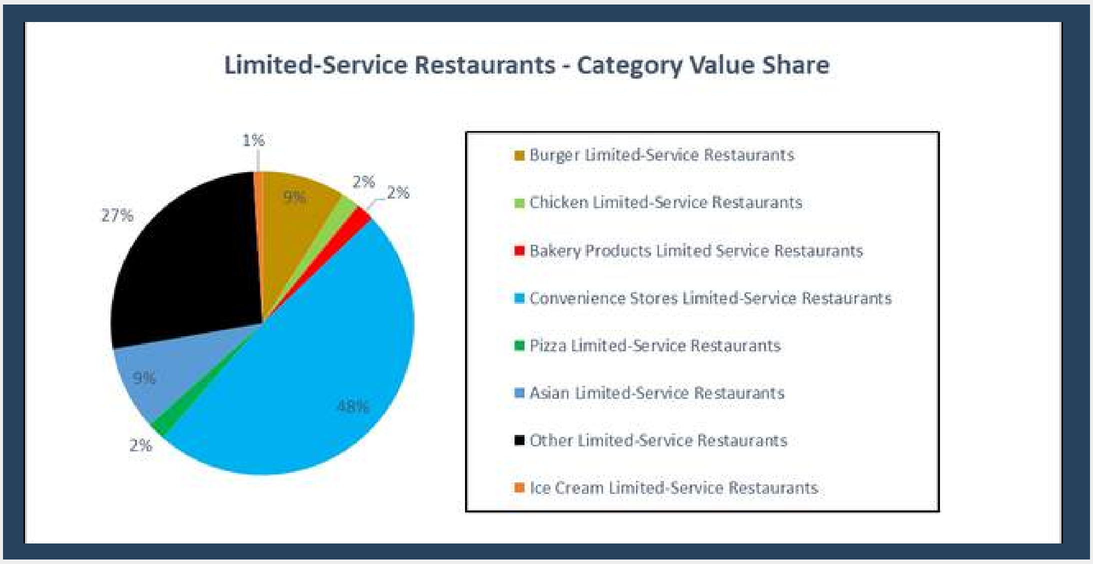
- Omnichannel retailers are forecast to have the most positive business prospects post-pandemic due to Japanese consumers remaining time-poor and restaurants in Japan looking to cut operational costs and improve efficiency following a period of overall sales decline in 2020.

- Low-carb, high-protein diets are very popular throughout Japan in full-service chains such as Ikinari! Steak due to the widespread belief that they aid longevity, a popular consideration for Japanese consumers when taking health factors into account.

Full-Service Restaurants - Category Value Share:



Limited-Service Restaurants - Category Value Share:



Source: Euromonitor, BBC, Japan Times, Santandertrade

Food & Drink e-Commerce Channel Developments

Key Trends:

- E-commerce Food & Beverage sales have grown rapidly in the last decade, the rate of which has been increasing since the beginning of 2020 with the COVID-19 pandemic leading Japanese consumers to prioritise home delivery, government measures fostering more trust in cashless payment methods, and demands for improved convenience and accessibility of food products.

- The trend towards e-commerce purchases in recent years, which has led Japan to become the fourth largest e-commerce market globally valued at over US$ 100 billion, is most profound amongst older generations in Japan, who have been slower to familiarise themselves with and trust the process of finding products and making purchases on the internet.

- The increase in dual-income families, long working hours, and overtime hours create a largely time-poor consumer base, leading Japanese consumers to progressively perform single bulk shops for their weekly groceries and prioritise purchasing methods that favour convenience, improving online retailer prospects.

- As consumers were very restricted from eating out during state of emergency declarations in Japan, gourmet options along with experimental DIY meal-kits began to appear on delivery menus that increasingly favour product differentiation for promotional items. A very successful example being Oisix's subscription-based delivery services offering a range of meal-kits, specialising in plant-based products.

Key E-tailers:

- The main three e-commerce platforms that collectively reach 100 million users nationwide; Rakuten, Amazon, and Yahoo, all have extensive online Food & Beverage catalogues and operate very successful delivery programs.

- Many convenience stores also offer online delivery options, with market giant 7-Eleven enabling Japanese consumers to make orders through their smartphone app and receive products within two hours.

Source: Euromonitor, ClickZ, BBC, Santandertrade, Nikkei Asia

Seafood Consumption in Japan

- Fish and seafood supply per person in Japan is valued at 45.49 kg as of 2017 according to the United Nations Food and Agricultural Organization (FAO).
    - *Food supply is defined as food available for human consumption. At country level, it is calculated as the food remaining for human use after deduction of all non-food utilizations*

Source: FAO, 2021

Market Access Requirements

Key Regulators:

- Ministry of Health, Labour, and Welfare (MHLW): Enforces the rules and regulations regarding Food & Beverage product safety by conducting checks on imports.
- Ministry of Agriculture, Forestry and Fisheries (MAFF): Creates and oversees the enforcement of the standards for Food & Beverage product quality in Japan.
- Consumer Affairs Agency (CAA): Oversees product labelling requirements.
- Ministry of Economy, Trade and Industry (METI): Sets quotas on certain imports.

Product Registration/Import Procedure:

- Use the Japanese Customs Service tariff schedule to determine the product tariff code that can be used to identify what benefits of JAEPA can be applied to the good.
- If the product can receive preferential treatment, prepare a Certificate of Origin to show proof of production in Australia if customs in Japan request proof.
- Prepare necessary documentation, including a Sanitation Certificate (if necessary) and Self-Inspection Results (if necessary). Whether these additional certificates are needed can be determined by checking the Food Sanitation Act on the MHLW website.
- For certain products, a pre-shipment inspection occurs and documentation of a successful check is created.
- Submit a "Notification Form of Importation of Foods, etc." to the MHLW Food Sanitation Inspection section, and then submit a Commercial Invoice along with a Bill of Lading to the business in Japan receiving the imports to ensure safe arrival of the cargo.
- Once the product is received in Japan, it will undergo quarantining and, if successful, the importer will receive a Certificate of Notification and Customs Clearance.

Documentation Required:

- "Notification Form of Importation of Foods, etc.".
- Customs Declaration Form
- Certificate of Origin
- Traceability documentation
- Bill of Lading
- Commercial invoice
- Insurance
- Packing list

General Labelling Requirements:

- The importer based in Japan is responsible for ensuring labels meet the below requirements. The importer may request that compliant labels are applied to products before they are shipped to Japan, however, this is not required by the Japanese government.
- The exact requirements differ as per whether the Food & Beverage product is fresh or processed.
- Written in Japanese
- Name of the Product
- Country of Origin
- Name and address of the Japanese importer
- Ingredient list
- Food additives in descending order of weight
- Storage instructions
- Expiry date
- Net quantity
- Allergen information
- Genetically engineered ingredient declaration
- Nutrition information

Packaging Requirements:

- Di-2-ethylhexyl cannot be used as a plasticizer for polyvinyl chloride used with foods containing edible fats and oils.
- Any packaging that touches food must not be made from more than 0.1% lead or 5% antimony.
- There are many other regulations that apply to certain metal packaging materials that can be found under the English "Chapter III: Apparatus, Containers and Packaging" document on the MHLW website.

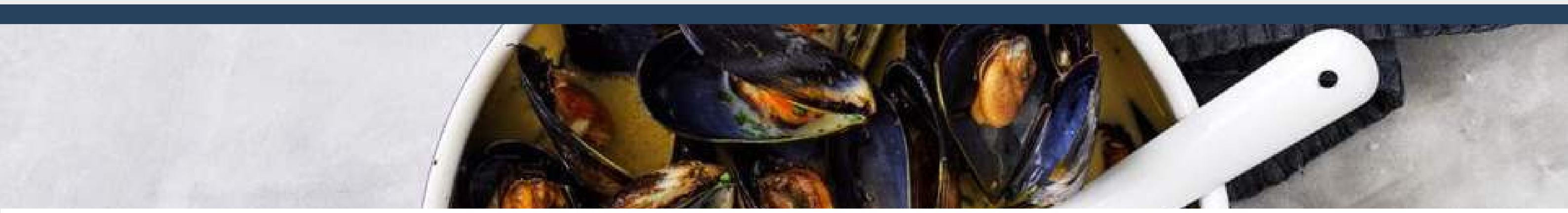
Non-Tariff Barriers:

- Import quotas: There are a range of quotas applicable to Australian exports such as certain seafoods. Some quotas were created by JAEPA, e.g. the honey quota, which can be applied for by filling out a JAEPA quota application form online. For quotas not created by JAEPA, applicability can be determined by using a translating service to navigate the "水産物の輸入割当て" page on the METI website. If a quota is applicable, exporters must obtain an import quota allocation certificate from the METI, allowing an import license to be received from a foreign exchange bank.
- Import declarations: Many raw materials, semi-finished products, and manufactured goods can be exported to Japan without previous approval from the METI with a completed import declaration form that can be authorised by approved foreign exchange banks.

Tariffs Levied:

- There is a range of different tariff classifications under JAEPA that could be applied to a product. For example, some goods produced in Australia are eligible to incur no tariffs at all, while some tariffs will be eliminated over three years, and others will receive a tariff-rate quota, etc.

Source: USDA Food and Agricultural Import Regulations and Standards Country Report [FAIRS], MHLW



Category Data

Fish and Seafood in Japan

2020 IMPACT

- Total volume sales of fish and seafood have been declining steadily for almost the last two decades. A similar trend was seen in 2019. Even as Japan continues to be one of the biggest consumers of fish and seafood globally, the country's demographic composition has been changing, resulting in lower sales. Since fish can be time-consuming to prepare in a fresh, unpackaged state, Japanese consumers have been gravitating towards packaged products.

- Japan has seen a steady increase in the rise of women in the workforce, as well as single-person households. Before the pandemic, time-poor Japanese consumers were frequently seeking more convenience, which was found through packaged fish and seafood, as compared to fresh seafood and fish. Packaged food as an overall category was also enticing customers away from fresh fish and seafood.

- However, after the onset of the pandemic, more consumers have been spending time at home, especially due to social distancing requirements. This has led to more consumers cooking and dining at home, resulting in a recovery in retail volume sales for the fish and seafood industry.

- Pacific Saury, one of Japan's most popular seafood products, has seen a rise in average price from approximately JPY75.00 per piece to over JPY100.00 per piece in 2020. This has primarily been due to fewer catches and an increase in demand from bordering countries like South Korea and China. These factors have led to a decrease in fish stocks around the shores of Japan.

- The economic impact of the pandemic, including fears over job security and income uncertainty, also resulted in consumers looking towards cheaper protein alternatives, including more economical cuts of meat. The latter has seen a surge in popularity during the review period. Hence, growth in retail volume sales notwithstanding, total volume sales for the fish and seafood industry did not see any notable rise.

- 2021-22 is expected to bring recovery for total volume sales of fish and seafood in Japan, along with a growth spike causing the pre-pandemic decline to reverse itself. This recovery will especially be due to the post-pandemic rising health consciousness of consumers who will see fish and seafood as a healthier source of protein and vitamins.

- Nevertheless, by the end of the forecast period, category sales are predicted to revert to pre-pandemic trends, which will cause a significant contraction in volume sales, thereby bringing about a strong slowdown.

- Consumption of seafood in Japan will be impacted by the increasing demand for seafood in neighbouring Asian countries since this is expected to cause unit prices of seafood to increase significantly. With these increasing prices and a trending pattern of a decline in consumption, especially among younger Japanese consumers, it is anticipated that both the private and public sectors will have to ramp up efforts in order to renew demand.

- For instance, Japan's Fisheries Agency's "Delight of a Fish-Rich Country" project is hoping to unite fishing organisations, retailers, manufacturers, educators and the government, so that the common aim of increasing the consumption of fish and seafood may be achieved. Through this initiative, education about eating fish and its role in traditional Japanese culture will be delivered in schools. Member bodies will also promote the consumption of seafood through rigorous marketing and promotions, including the creation of new dishes and recipes.

- The National Federation of Fisheries Co-operative Associations has also launched a "Pride Fish" campaign that aims to build consumer confidence and willingness to try different dishes by getting fishermen to promote their seafood recommendations. This project was built as a partner to the existing 'Fast Fish' initiative by the Fisheries Agency, which introduces consumers to fish dishes that can be made at home quickly.

Sector	Category	Country	Year	Value M USD	5yr CAGR M USD (%)
Fish & Seafood	Ambient Fish & Seafood	Japan	2020	2,347.90	2.35
			2025	2,863.14	4.05
	Chilled Raw Packaged Fish & Seafood - Processed	Japan	2020	2,663.69	2.40
			2025	3,181.80	3.62
	Chilled Raw Packaged Fish & Seafood - Whole Cuts	Japan	2020	1,854.45	2.37
			2025	2,212.47	3.59
	Dried Fish & Seafood	Japan	2020	434.23	2.86
			2025	515.18	3.48
	Fresh Fish & Seafood (Counter)	Japan	2020	1,337.12	1.95
			2025	1,629.42	4.03
	Frozen Fish & Seafood	Japan	2020	266.94	2.95
			2025	318.60	3.60

Source: GlobalData, 2021

ITC - Trade Data

Fresh or Chilled Fish in Japan

Japan - Trade Data - HS Code 0302 Fresh or Chilled Fish (Import):

Rank	Country	Imported Value (USD Thousand)	Quantity Imported (Tons)	Annual Growth Imported Value % (Short Term '19 - '20)	Annual Growth Imported Value % (Long Term '16 - '20)	Annual Growth Imported Quantity % (Long Term '16 - '20)
-	World	317,013	30,659	-24	-10	-10
1	Norway	126,734	13,709	-21	-7	-6
2	Mexico	37,991	1,917	-35	-8	-13
3	South Korea	29,341	2,991	-20	-9	-12
4	Indonesia	26,783	2,994	18	-20	-19
5	Canada	24,066	2,176	-15	1	1
6	Austalia	24,029	2,525	4	-7	-3
7	New Zealand	13,420	1,022	-14	-7	-7
8	USA	6,974	395\539	-36	-13	-22
9	United Kingdom	5,511	413	-50	10	7
10	Taiwan	3,697	640	-3	-11	-11

AUS - Trade Data - HS Code 0302 Fresh or Chilled Fish (Export):

Rank	Country	Exported Value (USD Thousand)	Quantity Exported	Annual Growth Exported Value % (Short Term '19 - '20)	Annual Growth Exported Value % (Long Term '16 - '20)	Annual Growth Exported Quantity % (Long Term '16 - '20)
-	World	39,164	6,135	-6	-6	-5
1	New Zealand	37,758	5,941	-1	-4	-3
2	Indonesia	913	136	-52	-14	-15
3	USA	180	9	6	-16	-17
4	South Korea	90	8	-23	56	28
5	Maldives	73	6	-76	-43	-45
6	Taiwan	69	22	-51	103	22
7	Malaysia	57	7	-	-33	24
8	Vietnam	9	3	-	-41	-36
9	Norway	4	1	-99	-73	-69
10	Tonga	4	<1	-94	-54	-

Source: ITC Trade Map, 2021

FRDC - Trade Data

Cod Exports - Value

AUS - Trade Data - Species: Cod <u>(Exports):</u>

Value of Exports - COD

Commodity Description	Value
Cod, frozen (excl. fish fillets, other fish meat, livers and roes)	$1,099,712
Fresh or chilled cod (Gadus morhua, Gadus ogac, Gadus macrocephalus) (excl. fillets and other meat of HS 0304 and livers and roes)	$878,777
Frozen cod (Gadus morhua, Gadus ogac, Gadus macrocephalus) (excl. fillets and other meat of HS 0304 and edible fish offal of HS 03039)	$380,914
Dried cod (Gadus morhua, Gadus ogac, Gadus macrocephalus), whether or not salted, but not smoked (excl. livers, roes and fillets)	$164,556
Fresh or chilled cod (Gadus morhua, Gadus ogac, Gadus macrocephalus) (excl. fillets and other meat of HS 0304 and edible fish offal of HS 03029)	$143,995
Frozen cod (Gadus morhua, Gadus ogac, Gadus macrocephalus) (excl. fillets and other meat of HS 0304 and livers and roes)	$136,606
Frozen cod (Gadus morhua, Gadus ogac, Gadus macrocephalus) (excl. fillets and other meat of HS 0304 and livers and roes)	$60,361
Cod (Gadus morhua, Gadus ogac, Gadus macrocephalus), salted or in brine, but not dried or smoked (excl. livers, roes and fillets)	$28,212
Fresh or chilled cod (Gadus morhua, Gadus ogac, Gadus macrocephalus) (excl. fillets and other meat of HS 0304 and livers and roes)	$19,457
Frozen fillets of cod (Gadus morhua, Gadus ogac, Gadus macrocephalus)	$13,312
Cod (Gadus morhua, Gadus ogac, Gadus macrocephalus), salted or in brine, but not dried or smoked (excl. fillets, livers, roes, edible offal and HS 030510)	$1,590
Dried cod (Gadus morhua, Gadus ogac, Gadus macrocephalus), whether or not salted, but not smoked (excl. fillets, livers, roes, edible offal and HS 030510)	$1,275

Value of Exports - Commodity Breakdown

Country	Value
Hong Kong	$858,352
Taiwan	$318,637
New Zealand	$300,378
Papua New Guinea	$271,741
Japan	$211,943
United States of America	$204,092
China	$172,139
Malaysia	$149,674
Singapore	$143,548
East Timor, Dem Rep of	$87,265
United Kingdom	$81,621
Indonesia	$46,583

Leading Export Destinations - Value

State	Value
QLD	$1,780,908
Foreign (re-export)	$431,630
VIC	$349,520
NSW	$287,981
WA	$55,727
SA	$10,655
NT	$7,180
TAS	$5,166

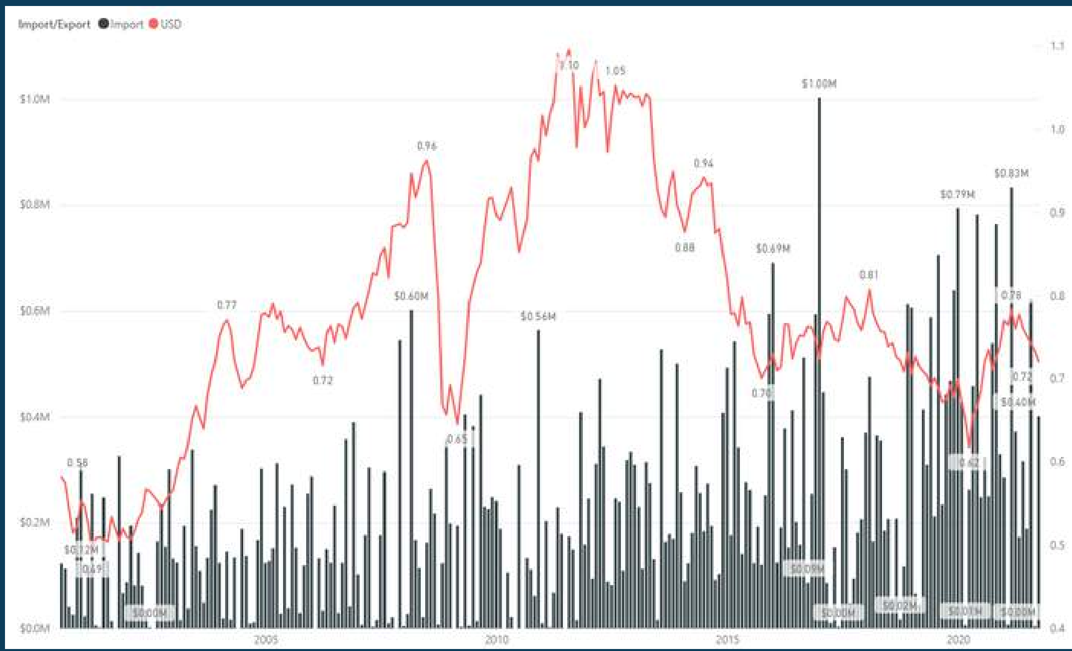
Export Value by State

Source: FRDC, 2021

FRDC - Trade Data

Cod Imports - Value

AUS - Trade Data - Species: Cod (Imports):



Value of Imports - COD

Commodity Description	Value
Frozen fillets of cod (Gadus morhua, Gadus ogac, Gadus macrocephalus)	$16,318,778
Dried cod (Gadus morhua, Gadus ogac, Gadus macrocephalus), whether or not salted, but not smoked (excl. livers, roes and fillets)	$15,504,517
Dried cod (Gadus morhua, Gadus ogac, Gadus macrocephalus), whether or not salted, but not smoked (excl. fillets, livers, roes, edible offal and HS 030510)	$11,555,059
Frozen cod (Gadus morhua, Gadus ogac, Gadus macrocephalus) (excl. fillets and other meat of HS 0304 and livers and roes)	$3,058,064
Frozen cod (Gadus morhua, Gadus ogac, Gadus macrocephalus) (excluding fillets an	$1,852,447
Cod (Gadus morhua, Gadus ogac, Gadus macrocephalus), salted or in brine, but not dried or smoked (excl. livers, roes and fillets)	$1,573,118
Frozen cod (Gadus morhua, Gadus ogac, Gadus macrocephalus) (excl. fillets and other meat of HS 0304 and livers and roes)	$1,440,549
Fresh or chilled cod (Gadus morhua, Gadus ogac, Gadus macrocephalus) (excl. fillets and other meat of HS 0304 and livers and roes)	$754,389
Cod (Gadus morhua, Gadus ogac, Gadus macrocephalus), salted or in brine, but not dried or smoked (excl. fillets, livers, roes, edible offal and HS 030510)	$642,798
Cod, frozen (excl. fish fillets and other fish meat of 0304, livers and roes)	$624,175
Fresh or chilled cod (Gadus morhua, Gadus ogac, Gadus macrocephalus) (excl. fillets and other meat of HS 0304 and livers and roes)	$602,071
Fresh or chilled cod (Gadus morhua, Gadus ogac, Gadus macrocephalus) (excluding	$206,989
Dried fish of the families Bregmacerotidae, Euclichthyidae, Gadidae, Macrouridae	$178,645

Value of Imports - Commodity Breakdown

Country	Value
Norway	$19,910,751
China	$10,791,646
Portugal	$8,221,809
Denmark	$4,216,127
United States of America	$1,622,063
South Africa	$1,533,687
Iceland	$1,341,391
New Zealand	$1,324,192
United Kingdom	$1,147,408
Italy	$814,880
Canada	$511,661
Japan	$446,408
Fiji	$346,544
Russian Federation	$265,363

Leading Import Sources - Value

State	Value
NSW	$21,164,124
VIC	$13,600,569
QLD	$13,207,114
WA	$5,389,505
SA	$928,638
NT	$21,649

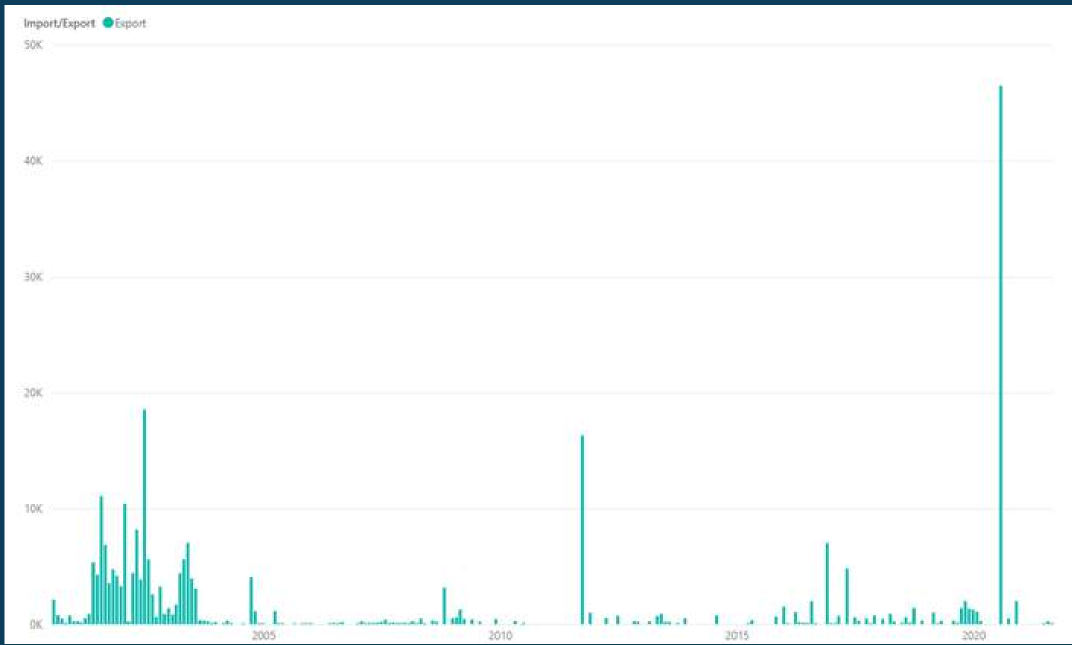
Import Value by State

Source: FRDC, 2021

FRDC - Trade Data

Cod Exports - Volume

AUS - Trade Data - Species: Cod (Exports):



Volume of Exports - COD

Commodity Description	Quantity
Fresh or chilled cod (Gadus morhua, Gadus ogac, Gadus macrocephalus) (excl. fillets and other meat of HS 0304 and livers and roes)	80,295
Frozen cod (Gadus morhua, Gadus ogac, Gadus macrocephalus) (excl. fillets and other meat of HS 0304 and edible fish offal of HS 03039)	62,621
Cod, frozen (excl. fish fillets, other fish meat, livers and roes)	62,586
Frozen cod (Gadus morhua, Gadus ogac, Gadus macrocephalus) (excl. fillets and other meat of HS 0304 and livers and roes)	19,525
Frozen cod (Gadus morhua, Gadus ogac, Gadus macrocephalus) (excl. fillets and other meat of HS 0304 and livers and roes)	14,586
Dried cod (Gadus morhua, Gadus ogac, Gadus macrocephalus), whether or not salted, but not smoked (excl. livers, roes and fillets)	8,990
Fresh or chilled cod (Gadus morhua, Gadus ogac, Gadus macrocephalus) (excl. fillets and other meat of HS 0304 and edible fish offal of HS 03029)	7,522
Fresh or chilled cod (Gadus morhua, Gadus ogac, Gadus macrocephalus) (excl. fillets and other meat of HS 0304 and livers and roes)	2,568
Frozen fillets of cod (Gadus morhua, Gadus ogac, Gadus macrocephalus)	1,568
Cod (Gadus morhua, Gadus ogac, Gadus macrocephalus), salted or in brine, but not dried or smoked (excl. livers, roes and fillets)	1,430
Cod (Gadus morhua, Gadus ogac, Gadus macrocephalus), salted or in brine, but not dried or smoked (excl. fillets, livers, roes, edible offal and HS 030510)	125
Dried cod (Gadus morhua, Gadus ogac, Gadus macrocephalus), whether or not salted, but not smoked (excl. fillets, livers, roes, edible offal and HS 030510)	125

Volume of Exports - Commodity Breakdown

Country	Quantity
Papua New Guinea	70,332
Hong Kong	55,072
New Zealand	26,789
Taiwan	17,901
Japan	16,909
China	15,816
United States of America	14,874
United Kingdom	14,475
Singapore	8,259
Malaysia	7,756
East Timor, Dem Rep of	6,583
Indonesia	2,060
Norway	1,060
Ship & Aircraft Stores	1,001

Leading Export Destinations - Volume

State	Quantity
QLD	162,140
Foreign (re-export)	39,462
NSW	27,365
VIC	26,060
WA	5,072
NT	798
SA	789
TAS	255

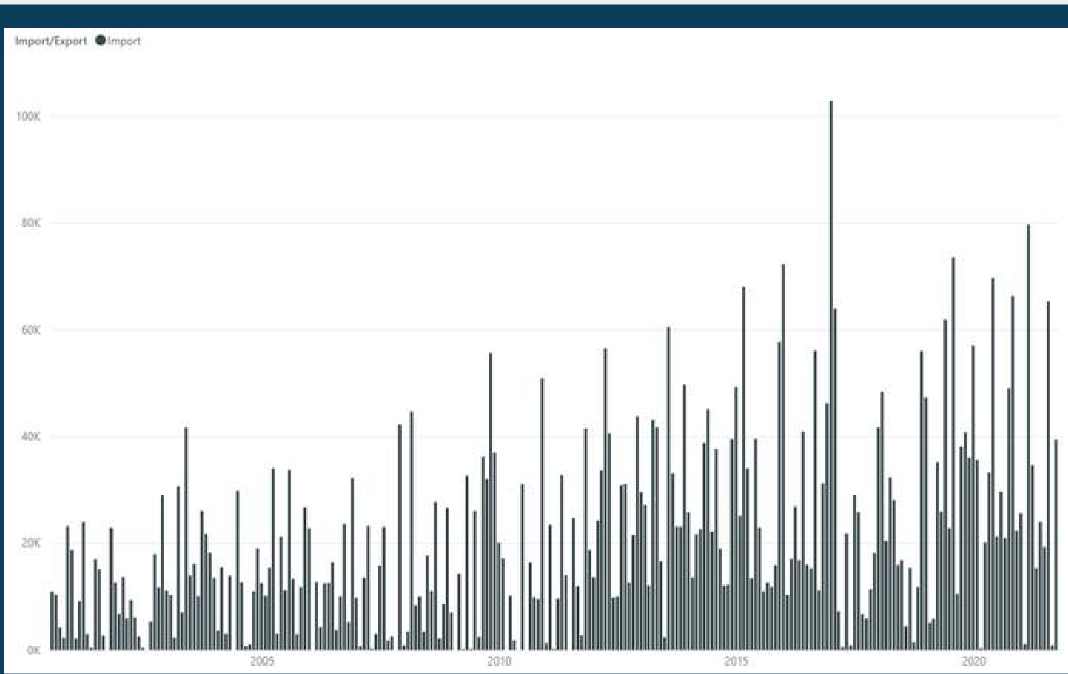
Export Volume by State

Source: FRDC, 2021

FRDC - Trade Data

Cod Imports - Volume

AUS - Trade Data - Species: Cod (Imports):



Volume of Imports - COD

Commodity Description	Quantity
Frozen fillets of cod (Gadus morhua, Gadus ogac, Gadus macrocephalus)	1,688,235
Dried cod (Gadus morhua, Gadus ogac, Gadus macrocephalus), whether or not salted, but not smoked (excl. livers, roes and fillets)	1,313,092
Dried cod (Gadus morhua, Gadus ogac, Gadus macrocephalus), whether or not salted, but not smoked (excl. fillets, livers, roes, edible offal and HS 030510)	968,607
Frozen cod (Gadus morhua, Gadus ogac, Gadus macrocephalus) (excl. fillets and other meat of HS 0304 and livers and roes)	449,175
Frozen cod (Gadus morhua, Gadus ogac, Gadus macrocephalus) (excluding fillets an	201,842
Cod (Gadus morhua, Gadus ogac, Gadus macrocephalus), salted or in brine, but not dried or smoked (excl. livers, roes and fillets)	178,896
Frozen cod (Gadus morhua, Gadus ogac, Gadus macrocephalus) (excl. fillets and other meat of HS 0304 and livers and roes)	171,516
Cod, frozen (excl. fish fillets and other fish meat of 0304, livers and roes)	116,368
Fresh or chilled cod (Gadus morhua, Gadus ogac, Gadus macrocephalus) (excl. fillets and other meat of HS 0304 and livers and roes)	96,287
Cod (Gadus morhua, Gadus ogac, Gadus macrocephalus), salted or in brine, but not dried or smoked (excl. fillets, livers, roes, edible offal and HS 030510)	59,522
Fresh or chilled cod (Gadus morhua, Gadus ogac, Gadus macrocephalus) (excl. fillets and other meat of HS 0304 and livers and roes)	45,825
Fresh or chilled cod (Gadus morhua, Gadus ogac, Gadus macrocephalus) (excluding	7,555
Dried fish of the families Bregmacerotidae, Euclichthyidae, Gadidae, Macrouridae	6,332

Volume of Imports - Commodity Breakdown

Country	Quantity
Norway	1,663,099
China	1,158,801
Portugal	771,304
Denmark	476,673
South Africa	267,111
New Zealand	223,941
Iceland	144,179
United Kingdom	114,478
United States of America	83,461
Italy	63,134
Russian Federation	51,366
Canada	40,278
Fiji	37,960
Japan	25,777

Leading Import Sources - Volume

State	Quantity
NSW	1,922,537
QLD	1,482,565
VIC	1,224,015
WA	605,571
SA	56,344
NT	12,220

Import Volume by State

Source: FRDC, 2021

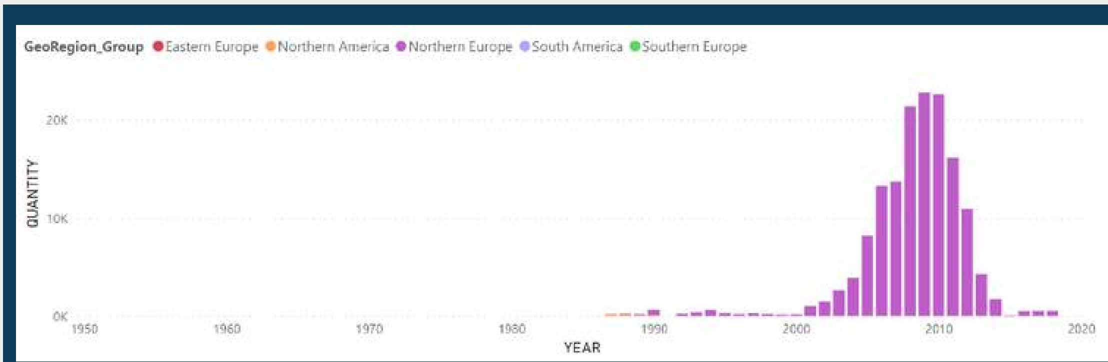
FRDC - Trade Data Sourced from FAO

Food and Agriculture Organization (FAO) Capture Production Quantity - Cods, Hakes, Haddocks

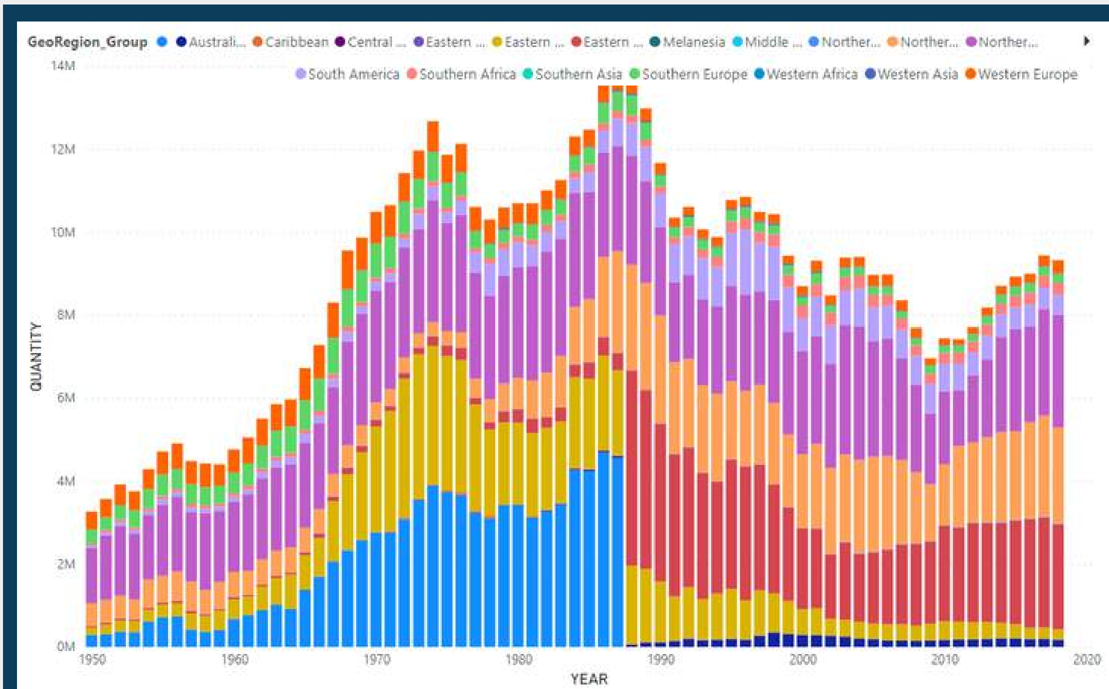
ISSCAAP Species: Cods, Hakes, Haddocks | Production

Country Name En	Unit Name	2019
Australia	Tonnes - live weight	2 359
Japan	Tonnes - live weight	207 090

Production Volume by ISSCAAP (International Standard Statistical Classification of Aquatic Animals and Plants) - FAO



Production Volume by GeoRegion - Aquaculture Production - FRDC



Production Volume by GeoRegion - Wild Catch Production - FRDC

Source: FAO, FRDC, 2021

Additional Resources

COUNTRY INSIGHTS

Agriculture and Agri-Food Canada - Japan Market Overview

Austrade - Japan Market Profile

DFAT - Japan Country Brief

DFAT - Japan Market Insights

Enterprise Singapore - Japan Market Profile

FoodExport - Japan Country Profile

HKTDC Research - Japan Market Profile

Santandar Trade Markets - Japan Market Overview

USDA - Japan Exporter Guide

CONSUMER INSIGHTS

Agriculture and Agri-Food Canada - Japan Consumer Profile

GWI - Japan Consumer Snapshot

Santandar Trade Markets - Reaching the Japanese Consumer

CATEGORY & CHANNEL INSIGHTS

Agriculture and Agri-Food Canada - Japan E-commerce Channel Overview

Agriculture and Agri-Food Canada - Japan Fish and Seafood Sector Overview

Euromonitor International - Japan Fish & Seafood Category Overview

Fisheries Research and Development Corporation (FRDC) - Australia-Specific Trade Data

International Trade Centre - Market-Specific Trade Data

USDA - Japan Foodservice Overview

USDA - Japan Retail Overview

MARKET ACCESS INSIGHTS

UNCTAD - Japan Investment Policy Hub

USDA - Japan Import Regulations & Standards

OTHER RESOURCES

EFIC
Export Connect Portal
Fitch Solutions
GlobalData
Google Trends
IbisWorld
L.E.K.
Marketline
McKinsey
Mintel
Nielsen
NZTE
Seafish UK
Statista
Trading Economics

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