



# Japan Market Summary & Category Data for Fish & Seafood - Southern Bluefin Tuna



# 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 its product 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

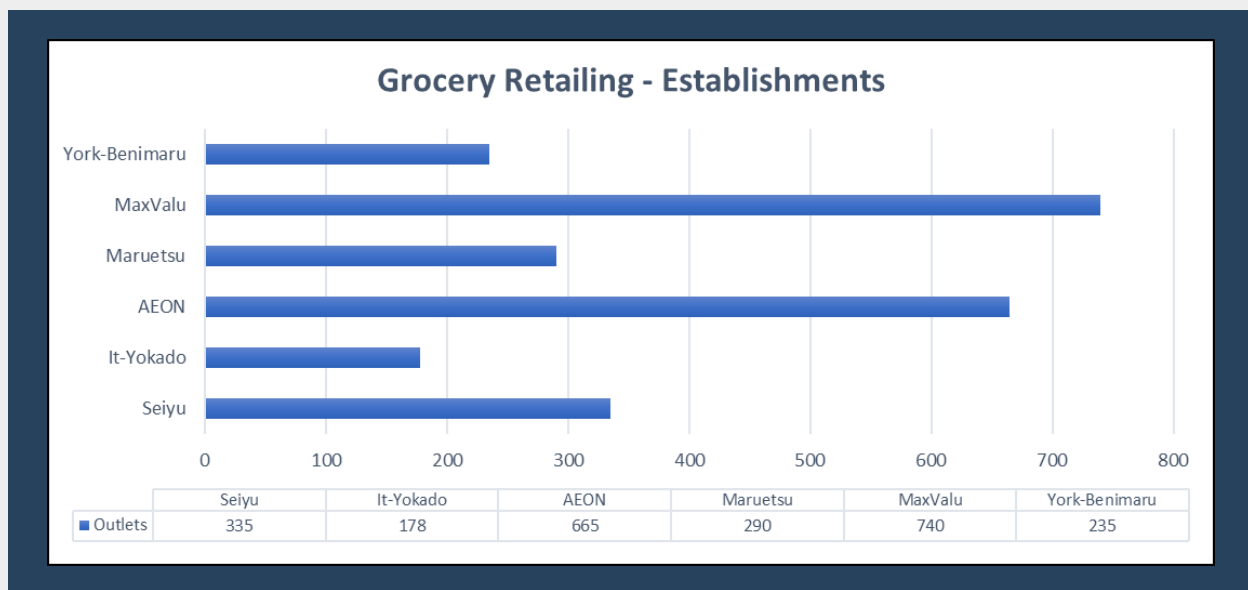
---

## Key Trends:

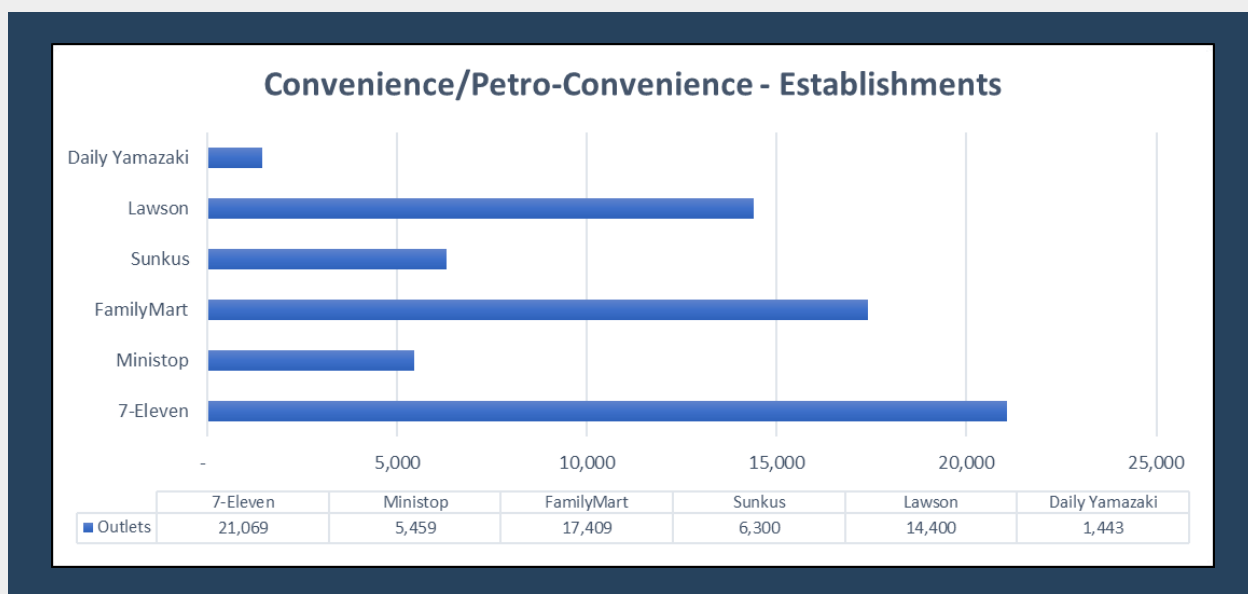
- Japan is one of the most valuable grocery markets in the world, worth approximately \$US466 billion a year with Japanese consumers ranked 4th globally for grocery purchases per capita.
- The grocery retail sales market share of traditional grocery retailers has suffered increasingly over the last decade 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

---

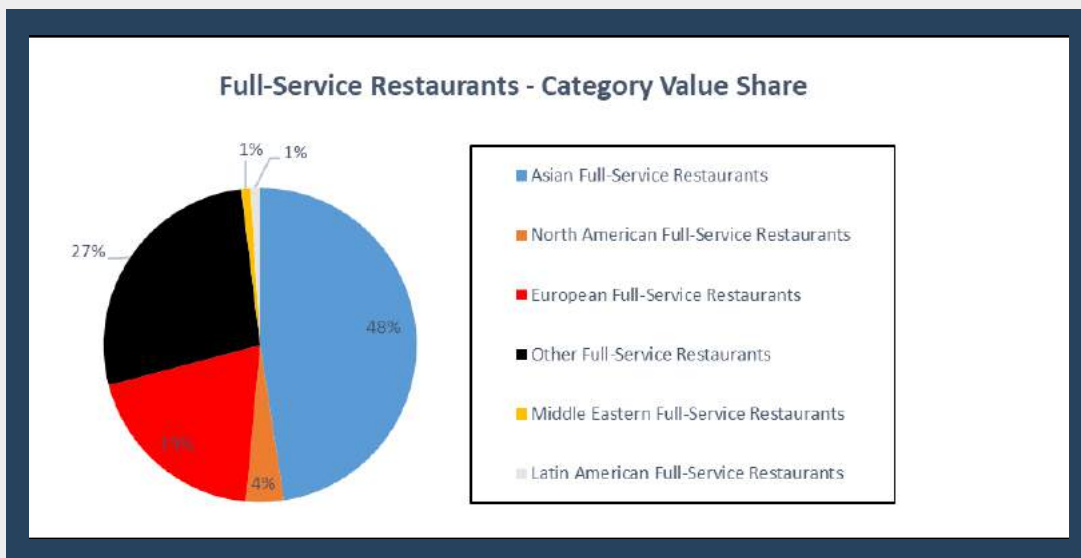
## Key Trends:

- 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.

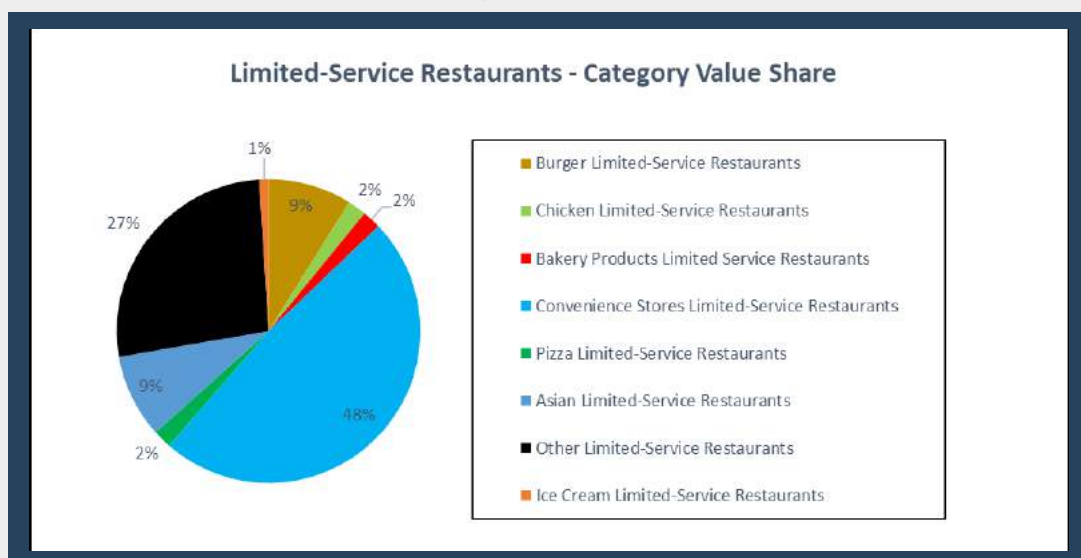


- Fast food chains successfully add value to customer experiences by frequently launching menu items tailored to specific times of the day or year. This is seen in McDonald's' "Night Mac" and the KFC Christmas Chicken Boxes, the latter of which are purchased by over 3 and a half million Japanese families 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	2021	2,347.44	.10
			2026	2,810.38	3.67
	Chilled Raw Packaged Fish & Seafood - Processed	Japan	2021	2,597.59	-.27
			2026	3,123.73	3.76
	Chilled Raw Packaged Fish & Seafood - Whole Cuts	Japan	2021	1,812.44	-.25
			2026	2,214.39	4.09
	Dried Fish & Seafood	Japan	2021	415.77	-.18
			2026	503.05	3.88
	Fresh Fish & Seafood (Counter)	Japan	2021	1,331.62	-.29
			2026	1,600.64	3.75
	Frozen Fish & Seafood	Japan	2021	255.92	-.09
			2026	315.17	4.25

Source: GlobalData, 2022



# ITC - Trade Data

## Frozen Southern Bluefin Tunas in Japan

Japan - Trade Data - HS Code 030346 Frozen Southern Bluefin Tunas [\(Import\):](#)

Rank	Country	Imported Value (USD Thousand)	Quantity Imported (Tons)	Annual Growth Imported Value % (Short Term '20 - '21)	Annual Growth Imported Value % (Long Term '17 - '21)	Annual Growth Imported Quantity % (Long Term '17 - '21)
-	World	100,508	9,213	3	-2	2
1	Australia	77,988	7,134	1	-2	2
2	South Korea	13,682	1,035	-1	1	3
3	Taiwan	8,839	1,045	45	1	5
4	-	-	-	-	-	-
5	-	-	-	-	-	-
6	-	-	-	-	-	-
7	-	-	-	-	-	-
8	-	-	-	-	-	-
9	-	-	-	-	-	-
10	-	-	-	-	-	-

AUS - Trade Data - HS Code 030346 Frozen Southern Bluefin Tunas [\(Export\):](#)

Rank	Country	Exported Value (USD Thousand)	Quantity Exported (Tons)	Annual Growth Exported Value % (Short Term '20 - '21)	Annual Growth Exported Value % (Long Term '17 - '21)	Annual Growth Exported Quantity % (Long Term '17 - '21)
-	World	67,535	7,179	22	-9	-3
1	Japan	67,535	7,179	22	-7	-1
2	-	-	-	-	-	-
3	-	-	-	-	-	-
4	-	-	-	-	-	-
5	-	-	-	-	-	-
6	-	-	-	-	-	-
7	-	-	-	-	-	-
8	-	-	-	-	-	-
9	-	-	-	-	-	-
10	-	-	-	-	-	-

Source: ITC Trade Map, 2022

# ITC - Trade Data

## Fresh or Chilled Southern Bluefin Tunas in Japan

Japan - Trade Data - HS Code 030236 Fresh or Chilled Southern Bluefin Tunas [\(Import\):](#)

Rank	Country	Imported Value (USD Thousand)	Quantity Imported (Tons)	Annual Growth Imported Value % (Short Term '20 - '21)	Annual Growth Imported Value % (Long Term '17 - '21)	Annual Growth Imported Quantity % (Long Term '17 - '21)
-	World	10,771	895	-21	-19	-18
1	New Zealand	7,461	558	-6	-7	-8
2	Australia	2,853	294	-44	-32	-27
3	Indonesia	342	36	69	-24	-21
4	South Africa	115	7	-59	-35	-35
5	-	-	-	-	-	-
6	-	-	-	-	-	-
7	-	-	-	-	-	-
8	-	-	-	-	-	-
9	-	-	-	-	-	-
10	-	-	-	-	-	-

AUS - Trade Data - HS Code 030236 Fresh or Chilled Southern Bluefin Tunas [\(Export\):](#)

Rank	Country	Exported Value (USD Thousand)	Quantity Exported (Tons)	Annual Growth Exported Value % (Short Term '20 - '21)	Annual Growth Exported Value % (Long Term '17 - '21)	Annual Growth Exported Quantity % (Long Term '17 - '21)
-	World	7,550	658	-72	2	0
1	Japan	3,665	353	-86	-10	-11
2	USA	3,393	270	516	92	92
3	China	488	35	-42	2	9
4	New Zealand	2	<1	-3	-	-
5	Thailand	1	<1	-	-	-
6	Malaysia	1	<1	-	-	-
7	-	-	-	-	-	-
8	-	-	-	-	-	-
9	-	-	-	-	-	-
10	-	-	-	-	-	-

Source: ITC Trade Map, 2022

## ITC - Trade Data

### *Fresh or Chilled Atlantic and Pacific Bluefin Tuna in Japan*

Japan - Trade Data - HS Code 030235 Fresh or chilled Atlantic and Pacific bluefin tuna (Thunnus thynnus, Thunnus orientalis) (Import):

Rank	Country	Imported Value (USD Thousand)	Quantity Imported (Tons)	Annual Growth Imported Value % (Short Term '20 - '21)	Annual Growth Imported Value % (Long Term '17 - '21)	Annual Growth Imported Quantity % (Long Term '17 - '21)
-	World	59,974	3,192	5	-7	-9
1	Mexico	45,556	2,390	20	-6	-8
2	Canada	5,461	231	-24	-6	-5
3	USA	4,158	166	-25	-13	-12
4	Spain	1,418	58	37	-17	-17
5	South Korea	1,271	248	-21	-12	-13
6	New Zealand	677	29	-17	33	37
7	France	659	27	1,133	-36	-36
8	Greece	541	31	45	-29	-25
9	Taiwan	99	6	206	-	-
10	Cyprus	81	5	-41	-20	-12

AUS - Trade Data - HS Code 030235 Fresh or chilled Atlantic and Pacific bluefin tuna (Thunnus thynnus, Thunnus orientalis) (Export):

Rank	Country	Exported Value (USD Thousand)	Quantity Exported (Tons)	Annual Growth Exported Value % (Short Term '20 - '21)	Annual Growth Exported Value % (Long Term '17 - '21)	Annual Growth Exported Quantity % (Long Term '17 - '21)
-	World	663	51	5,736	74	36
1	USA	562	41	-	-	-
2	Japan	101	10	789	19	-10
3	-	-	-	-	-	-
4	-	-	-	-	-	-
5	-	-	-	-	-	-
6	-	-	-	-	-	-
7	-	-	-	-	-	-
8	-	-	-	-	-	-
9	-	-	-	-	-	-
10	-	-	-	-	-	-

Source: ITC Trade Map, 2022

# ITC - Trade Data

## Frozen Atlantic and Pacific Bluefin Tuna in Japan

Japan - Trade Data - HS Code 030345 Frozen Atlantic and Pacific bluefin tuna (Thunnus thynnus, Thunnus orientalis) [\(Import\):](#)

Rank	Country	Imported Value (USD Thousand)	Quantity Imported (Tons)	Annual Growth Imported Value % (Short Term '20 - '21)	Annual Growth Imported Value % (Long Term '17 - '21)	Annual Growth Imported Quantity % (Long Term '17 - '21)
-	World	4,974	434	6	5	5
1	South Korea	4,075	372	-5	54	25
2	China	667	40	-	-57	-5
3	Malta	68	3	-42	-22	-50
4	Spain	52	3	86	-19	-44
5	Turkey	43	6	-69	-25	-2
6	Croatia	37	2	-48	-21	-14
7	Tunisia	10	1	-	-	-
8	Morocco	8	1	-28	-16	-9
9	Taiwan	6	1	-	-	-
10	Italy	6	3	-82	42	-

AUS - Trade Data - HS Code 030345 Frozen Atlantic and Pacific bluefin tuna (Thunnus thynnus, Thunnus orientalis) [\(Export\):](#)

Rank	Country	Exported Value (USD Thousand)	Quantity Exported (Tons)	Annual Growth Exported Value % (Short Term '20 - '21)	Annual Growth Exported Value % (Long Term '17 - '21)	Annual Growth Exported Quantity % (Long Term '17 - '21)
-						
1						
2						
3						
4						
5						
6						
7						
8						
9						
10						

NO DATA RECORDED

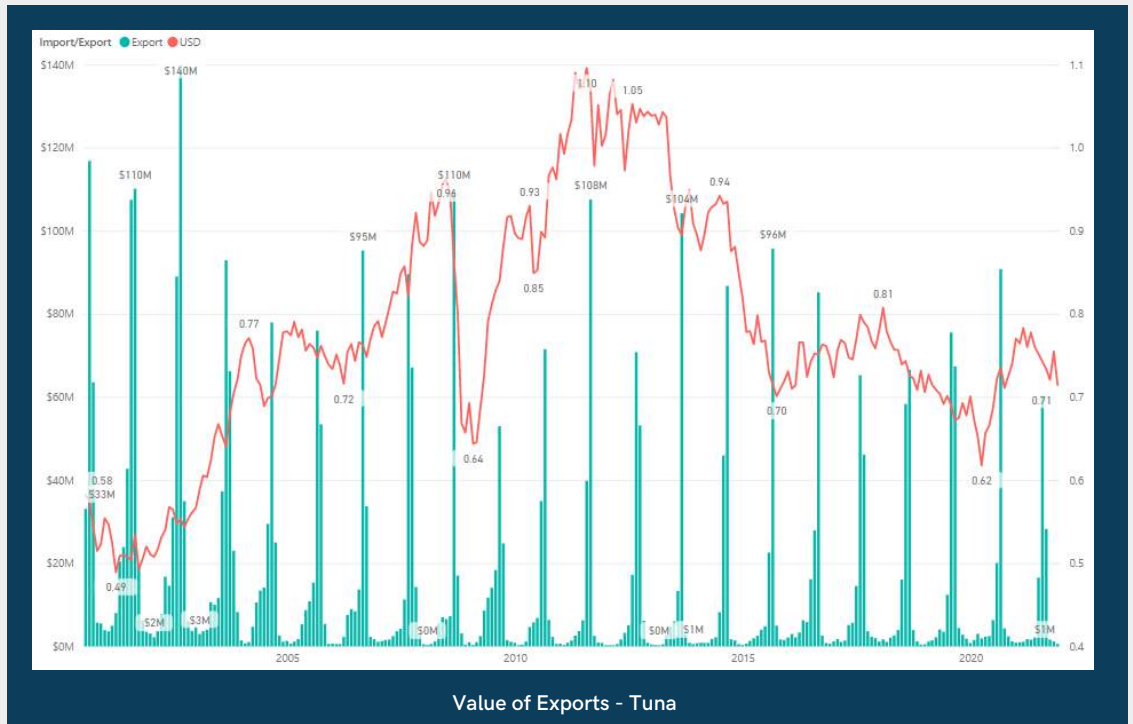
Source: ITC Trade Map, 2022

# FRDC - Trade Data

## Tuna Exports - Value

AUS - Trade Data - Species: Tuna (incl. Bluefin Tuna)

(Exports):



Commodity Description	Value
Frozen southern bluefin tunas (Thunnus maccoyii) (exc. filets and other meat of HS 0304 and livers and roes)	\$1,705,121,603
Fresh or chilled southern bluefin tunas (Thunnus maccoyii) (exc. filets and other meat of HS 0304 and livers and roes)	\$260,462,899
Frozen southern bluefin tunas (Thunnus maccoyii) (exc. filets and other meat of HS 0304 and edible fish offal of HS 03039)	\$331,417,326
Tunas (other than albacore, yellowfin and skipjack), frozen (exc. filets and other fish meat, livers and roes)	\$252,028,085
Fresh or chilled yellowfin tunas (Thunnus albacares) (exc. filets and other meat of HS 0304 and livers and roes)	\$201,051,833
Tunas (other than albacore, yellowfin or skipjack), fresh or chilled (exc. fish filets, other fish meat, livers and roes)	\$195,386,802
Fresh or chilled skipjack tunas (Thunnus obesus) (exc. filets and other meat of HS 0304 and livers and roes)	\$95,612,293
Fresh or chilled southern bluefin tunas (Thunnus maccoyii) (exc. filets and other meat of HS 0304 and edible fish offal of HS 03039)	\$66,696,461
Tuna meat, frozen (exc. filets)	\$71,627,449
Prepared or preserved tunas, skipjack and bonito (Sarda sarda) whole or in pieces, but not minced (exc. tunas, skipjack and bonito (Sarda sarda) of Chapter 03)	\$62,917,324
Fresh or chilled yellowfin tunas (Thunnus albacares) (exc. filets and other meat of HS 0304 and edible fish offal of HS 03039)	\$41,094,516
Live Atlantic and Pacific bluefin tunas (Thunnus thynnus Thunnus orientalis)	\$35,822,095
Fresh or chilled albacore or longfinned tunas (Thunnus alalunga) (exc. filets and other meat of HS 0304 and livers and roes)	\$22,193,163
Frozen albacore or longfinned tunas (Thunnus alalunga) (exc. filets and other meat of HS 0304 and livers and roes)	\$18,426,962
Fresh or chilled tunas of the genus Thunnus (exc. albacore or longfinned, yellowfin, bigeye, bluefin and southern bluefin tunas; skipjack or stripe-bellied bonito; filets and other meat of HS 0304 and livers and roes)	\$16,340,920
Fresh or chilled skipjack tunas (Thunnus obesus) (exc. filets and other meat of HS 0304 and edible fish offal of HS 03039)	\$13,481,070
Frozen albacore or longfinned tunas (Thunnus alalunga) (exc. filets and other meat of HS 0304 and edible fish offal of HS 03039)	\$12,889,433
Frozen bluefin tunas (Thunnus thynnus) (exc. southern bluefin tunas; filets and other meat of HS 0304 and livers and roes)	\$6,932,839
Frozen yellowfin tunas (Thunnus albacares) (exc. filets and other meat of HS 0304 and livers and roes)	\$6,364,465
Fresh or chilled albacore or longfinned tunas (Thunnus alalunga) (exc. filets and other meat of HS 0304 and edible fish offal of HS 03039)	\$2,650,766

Value of Exports - Top 20 Commodity Breakdown

Country	Value
Japan	\$3,716,438,349
United States of America	\$143,532,962
New Zealand	\$57,046,472
Thailand	\$20,895,475
Korea, Republic of	\$16,363,196
China	\$15,994,743
Samoa (American)	\$10,961,764
Spain	\$8,503,419
Iran	\$6,603,407
Iran, Islamic Republic of	\$5,596,400
Singapore	\$4,972,739
Vietnam	\$4,373,949

Leading Export Destinations - Value

State	Value
SA	\$3,399,041,826
QLD	\$326,545,497
NSW	\$151,173,546
WA	\$61,817,492
Foreign (re-export)	\$48,983,770
VIC	\$37,578,419
TAS	\$3,061,536
NT	\$5,772

Export Value by State

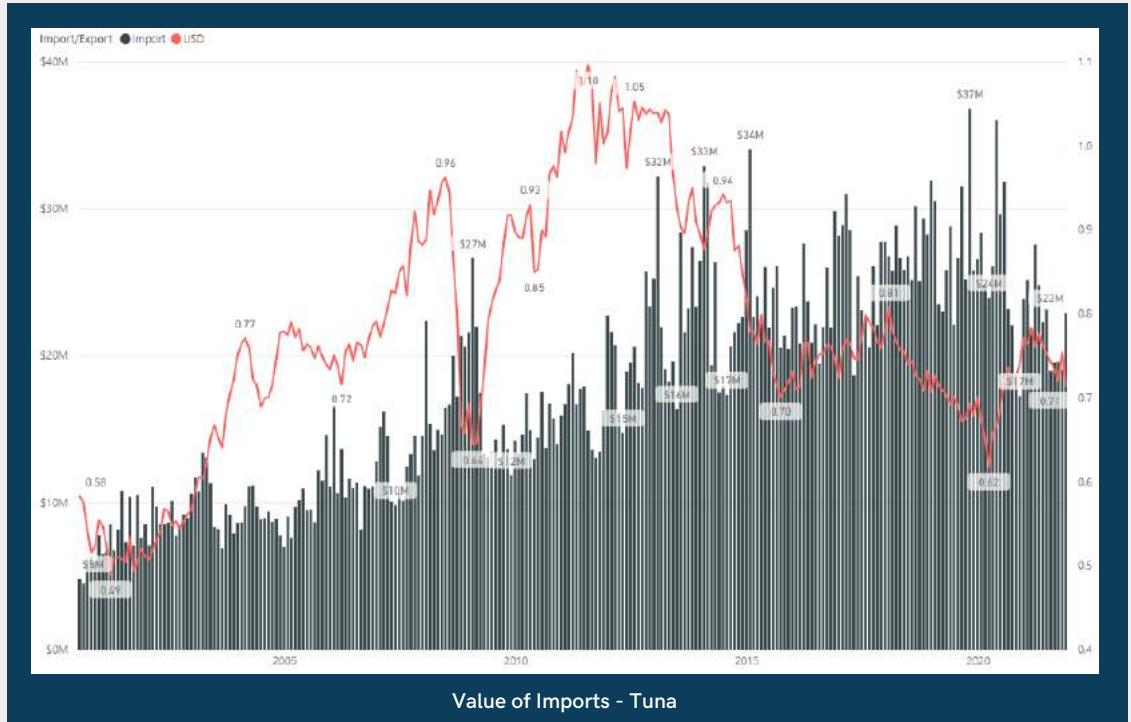
Source: FRDC, 2022

# FRDC - Trade Data

## Tuna Imports - Value

AUS - Trade Data - Species: Tuna (incl. Bluefin Tuna)

(Imports):



Commodity Description	Value
Prepared or preserved tunas, skipjack and bonito (Sarda spp) whole or in pieces, but not minced, packed in air-tight cans, bottles, jars or similar containers (excl. goods of Chapter 05)	\$4,341,487,148
Prepared or preserved tunas, skipjack and bonito (Sarda spp) whole or in pieces, but not minced (excl. goods packed in air-tight cans, bottles, jars or similar containers and goods of Chapter 05)	\$59,823,729
Frozen filets of tunas (of the genus Thunnus), skipjack or stripe-bellied bonito (Euthynnus, Katsuwonus, pelamis)	\$55,094,140
Prepared or preserved tunas, skipjack and bonito (Sarda spp) and other fish of the tribes Thunnini or Sardinii (incl. minced fish) (excl. whole fish or fish in pieces and goods of Chapter 05)	\$14,793,496
Fresh or chilled yellowfin tunas (Thunnus albacares) (excl. filets and other meat of HS 0304 and livers and roes)	\$14,528,187
Frozen skipjack or stripe-bellied bonito (Euthynnus (Katsuwonus) pelamis) (excl. filets and other meat of HS 0304 and livers and roes)	\$11,264,650
Frozen yellowfin tunas (Thunnus albacares) (excl. filets and other meat of HS 0304 and livers and roes)	\$4,973,253
Fresh or chilled yellowfin tunas (Thunnus albacares) (excluding filets and other)	\$4,616,261
Frozen Atlantic and Pacific bluefin tunas (Thunnus thynnus, Thunnus orientalis)	\$3,985,172
Fresh or chilled tunas of the genus Thunnus (excl. albacore or longfinned, yellowfin, bigeye, bluefin and southern bluefin tunas; skipjack or stripe-bellied bonito; filets and other meat of HS 0304 and livers and roes)	\$3,685,640
Fresh or chilled bigeye tunas (Thunnus obesus) (excl. filets and other meat of HS 0304 and livers and roes)	\$1,683,090
Frozen skipjack or stripe-bellied bonito (Euthynnus (Katsuwonus) pelamis) (excl. filets and other meat of HS 0304 and livers and roes)	\$1,392,406
Fresh or chilled skipjack or stripe-bellied bonito (Euthynnus (Katsuwonus) pelamis) (excl. filets and other meat of HS 0304 and livers and roes)	\$990,910
Frozen Atlantic and Pacific bluefin tunas (Thunnus thynnus, Thunnus orientalis) (excl. filets and other meat of HS 0304 and livers and roes)	\$814,320
Frozen tunas (of the genus Thunnus) (excluding those of HS 03041 to 03048, 9)	\$840,838
Frozen tunas (of the genus Thunnus) (excl. albacore, longfinned, yellowfin and bigeye tunas; Atlantic and Pacific bluefin and Southern bluefin tunas; skipjack or stripe-bellied bonito; filets and other meat of HS 0304 and livers and roes)	\$540,050
Frozen tunas of the genus Thunnus (excl. albacore or longfinned tunas; yellowfin tunas; bigeye tunas; bluefin tunas; southern bluefin tunas; skipjack or stripe-bellied bonito; filets and other meat of HS 0304 and livers and roes)	\$220,362
Fresh or chilled bigeye tunas (Thunnus obesus) (excluding filets and other meat)	\$200,509
Frozen albacore or longfinned tunas (Thunnus alalunga) (excl. filets and other meat of HS 0304 and livers and roes)	\$198,744
Fresh or chilled Southern bluefin tunas (Thunnus maccoyii) (including filets and other)	\$148,320

Value of Imports - Top 20 Commodity Breakdown

Country	Value
Thailand	\$4,003,123,779
Indonesia	\$364,813,606
Vietnam	\$35,458,863
Philippines	\$30,489,246
Italy	\$22,192,917
Japan	\$12,973,095
New Zealand	\$11,457,516
Korea, Republic of	\$9,444,166
China	\$8,072,253
Maldives	\$7,769,917
Fiji	\$7,058,191
Spain	\$5,521,015

Leading Import Sources - Value

State	Value
VIC	\$2,697,607,651
NSW	\$1,031,115,277
QLD	\$416,663,416
WA	\$214,182,359
SA	\$193,684,335
TAS	\$754,303
NT	\$33,604

Import Value by State

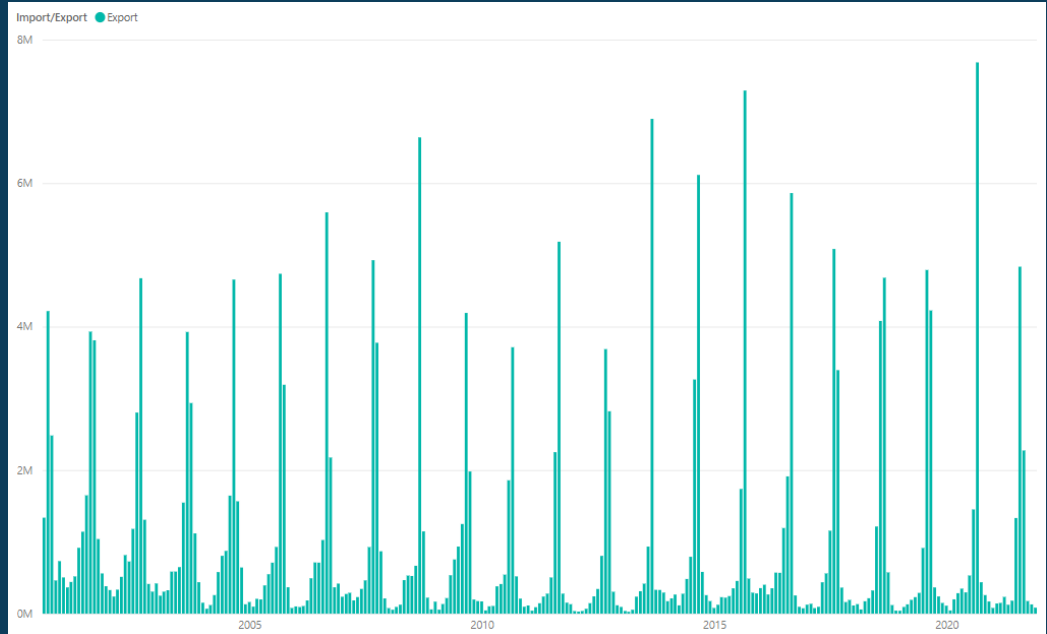
Source: FRDC, 2022

# FRDC - Trade Data

## Tuna Exports - Volume

AUS - Trade Data - Species: Tuna (incl. Bluefin Tuna)

(Exports):



Volume of Exports - Tuna

Commodity Description	Quantity
Frozen southern bluefin tunas (Thunnus maccoyii) (excl. filets and other meat of HS 0304 and livers and roes)	95,664,266
Frozen southern bluefin tunas (Thunnus maccoyii) (excl. filets and other meat of HS 0304 and edible fish offal of HS 03029)	37,809,406
Fresh or chilled southern bluefin tunas (Thunnus maccoyii) (excl. filets and other meat of HS 0304 and livers and roes)	25,958,210
Fresh or chilled yellowfin tunas (Thunnus albacares) (excl. filets and other meat of HS 0304 and livers and roes)	20,485,289
Prepared or presented tunas, skipjack and bonito (Sarda spp.) whole or in pieces, but not minced (excl. tunas, skipjack and bonito (Sarda spp.) of Chapter 03)	14,673,342
Fresh or chilled bigeye tunas (Thunnus obesus) (excl. filets and other meat of HS 0304 and livers and roes)	8,973,080
Tunas (other than albacore, yellowfin and skipjack), frozen (excl. fish filets, other fish meat, livers and roes)	8,223,501
Tunas (other than albacore, yellowfin or skipjack), fresh or chilled (excl. fish filets, other fish meat, livers and roes)	7,657,381
Frozen albacore or longfinned tunas (Thunnus alalunga) (excl. filets and other meat of HS 0304 and livers and roes)	4,406,110
Fresh or chilled Southern bluefin tunas (Thunnus maccoyii) (excl. filets and other meat of HS 0304 and edible fish offal of HS 03029)	3,786,701
Fresh or chilled albacore or longfinned tunas (Thunnus alalunga) (excl. filets and other meat of HS 0304 and livers and roes)	3,791,635
Frozen albacore or longfinned tunas (Thunnus alalunga) (excl. filets and other meat of HS 0304 and edible fish offal of HS 03029)	3,656,683
Fresh or chilled yellowfin tunas (Thunnus albacares) (excl. filets and other meat of HS 0304 and edible fish offal of HS 03029)	2,702,886
Tuna meat, frozen (excl. filets)	2,637,096
Fresh or chilled tunas of the genus Thunnus (excl. albacore or longfinned, yellowfin, bigeye, bluefin and southern bluefin tunas; skipjack or stripe-bellied bonito; filets and other meat of HS 0304 and livers and roes)	1,651,066
Fresh or chilled bigeye tunas (Thunnus obesus) (excl. filets and other meat of HS 0304 and edible fish offal of HS 03029)	1,048,333
Frozen yellowfin tunas (Thunnus albacares) (excl. filets and other meat of HS 0304 and livers and roes)	436,310
Frozen bluefin tunas (Thunnus thynnus) (excl. southern bluefin tunas; filets and other meat of HS 0304 and livers and roes)	406,103
Frozen skipjack or stripe-bellied bonito (Euthynnus (Katsuwonus) pelamis) (excl. filets and other meat of HS 0304 and livers and roes)	274,100
Fresh or chilled albacore or longfinned tunas (Thunnus alalunga) (excl. filets and other meat of HS 0304 and edible fish offal of HS 03029)	263,516

Volume of Exports - Top 20 Commodity Breakdown

Country	Quantity
Japan	207,892,729
New Zealand	13,773,232
United States of America	10,578,112
Thailand	5,928,112
Samoa (American)	3,811,081
Spain	2,036,830
Vietnam	1,402,056
Korea, Republic of	916,444
China	716,608
Singapore	524,180
Indonesia	238,761
Federated States of Micronesia	210,668

Leading Export Destinations - Volume

State	Quantity
SA	176,604,915
QLD	40,862,474
Foreign (re-export)	11,459,703
NSW	11,292,303
WA	5,473,498
VIC	3,519,629
TAS	158,096
NT	855

Export Volume by State

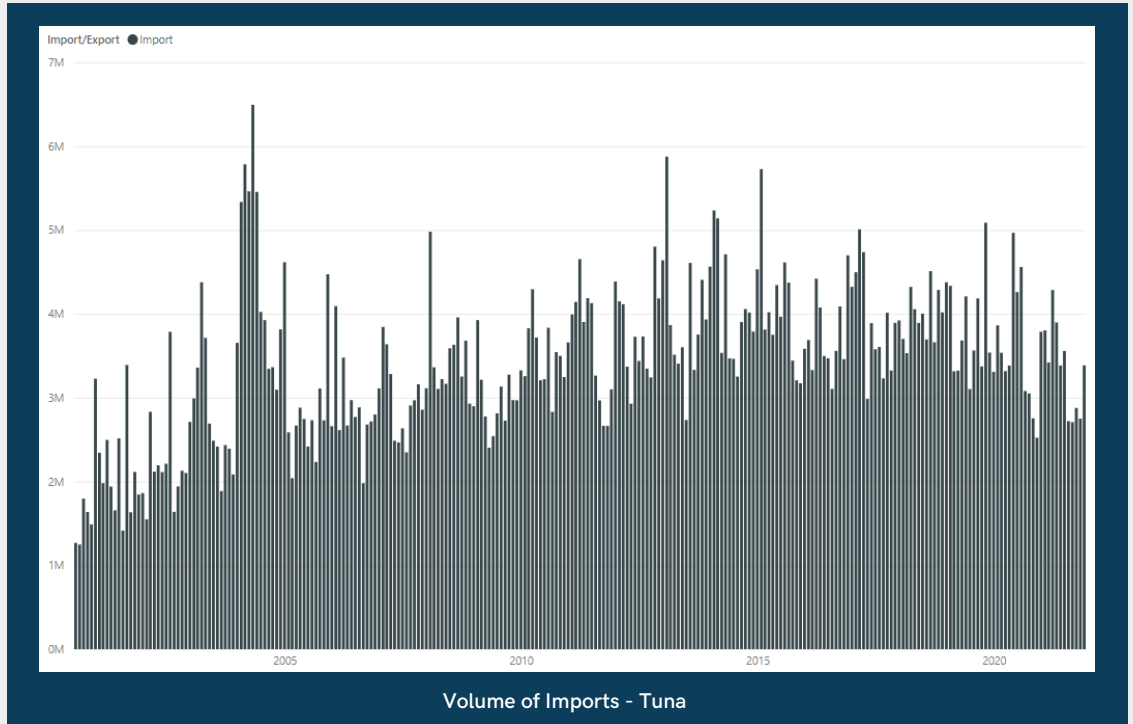
Source: FRDC, 2022

# FRDC - Trade Data

## Tuna Imports - Volume

AUS - Trade Data - Species: Tuna (incl. Bluefin Tuna)

(Imports):



Commodity Description	Quantity
Prepared or preserved tunas, skipjack and bonito (Sarda spp) whole or in pieces, but not minced, packed in air-tight cans, bottles, jars or similar containers (excl. goods of Chapter 03)	827,573,993
Prepared or preserved tunas, skipjack and bonito (Sarda spp) whole or in pieces, but not minced (excl. goods packed in air-tight cans, bottles, jars or similar containers and goods of Chapter 03)	20,460,274
Frozen skipjack or stripe-bell bonito (Euthyrinus (Katsuwonus) pelamis) (excl. filets and other meat of HS 0304 and livers and roes)	11,221,067
Prepared or preserved tunas, skipjack and bonito (Sarda spp) and other fish of the tribes Thunnini or Sardinini (incl. minced fish) (excl. whole fish or fish in pieces and goods of Chapter 03)	5,062,803
Frozen filets of tunas (of the genus Thunnus), skipjack or stripe-bell bonito (Euthyrinus (Katsuwonus) pelamis)	3,281,910
Frozen yellowfin tunas (Thunnus albacares) (excl. filets and other meat of HS 0304 and livers and roes)	2,181,314
Fresh or chilled yellowfin tunas (Thunnus albacares) (excl. filets and other meat of HS 0304 and livers and roes)	2,021,522
Frozen skipjack or stripe-bell bonito (Euthyrinus (Katsuwonus) pelamis) (excl. filets and other meat of HS 0304 and livers and roes)	1,375,541
Fresh or chilled skipjack or stripe-bell bonito (Euthyrinus (Katsuwonus) pelamis) (excl. filets and other meat of HS 0304 and livers and roes)	1,019,937
Fresh or chilled tunas of the genus Thunnus (excl. albacore or longfinned, yellowfin, bigeye, bluefin and southern bluefin tunas; skipjack or stripe-bell bonito; filets and other meat of HS 0304 and livers and roes)	991,474
Fresh or chilled yellowfin tunas (Thunnus albacares) (excluding filets and roes)	329,381
Fresh or chilled bigeye tunas (Thunnus obesus) (excl. filets and other meat of HS 0304 and livers and roes)	182,351
Frozen tunas (of the genus Thunnus) (excl. albacore, longfinned, yellowfin, bigeye, bluefin and southern bluefin tunas; skipjack or stripe-bell bonito; filets and other meat of HS 0304 and livers and roes)	111,423
Frozen tunas of the genus Thunnus (excluding those of HS 0304 to 0304.6, ff)	109,495
Frozen tunas of the genus Thunnus (excl. albacore or longfinned tunas; bigeye tunas; bluefin tunas; southern bluefin tunas; skipjack or stripe-bell bonito; filets and other meat of HS 0304 and livers and roes)	65,516
Frozen albacore or longfinned tunas (Thunnus alalunga) (excl. filets and other meat of HS 0304 and livers and roes)	48,834
Frozen Atlantic and Pacific bluefin tunas (Thunnus thynnus, Thunnus orientalis)	35,713
Tunas, frozen (excl. albacore, longfinned and yellowfin tunas; fish filets and other fish meat of 0304; livers and roes)	28,438
Fresh or chilled albacore or longfinned tunas (Thunnus alalunga) (excl. filets and other meat of HS 0304 and livers and roes)	25,790
Fresh or chilled southern bluefin tunas (Thunnus maccoyii) (excluding filets and	23,158

Volume of Imports - Top 20 Commodity Breakdown

Country	Quantity
Thailand	788,939,998
Indonesia	47,627,193
New Zealand	8,868,608
Vietnam	6,014,572
Philippines	5,846,760
Japan	3,722,430
China	2,426,563
Italy	2,057,746
Country Unknown	1,662,000
Korea, Republic of	1,490,968
Fiji	1,083,029
Papua New Guinea	717,385

Leading Import Sources - Volume

State	Quantity
VIC	495,334,300
NSW	198,589,398
QLD	84,230,002
SA	52,946,848
WA	44,304,872
TAS	239,922
NT	3,470

Import Volume by State

Source: FRDC, 2022



# FRDC - Trade Data Sourced from FAO

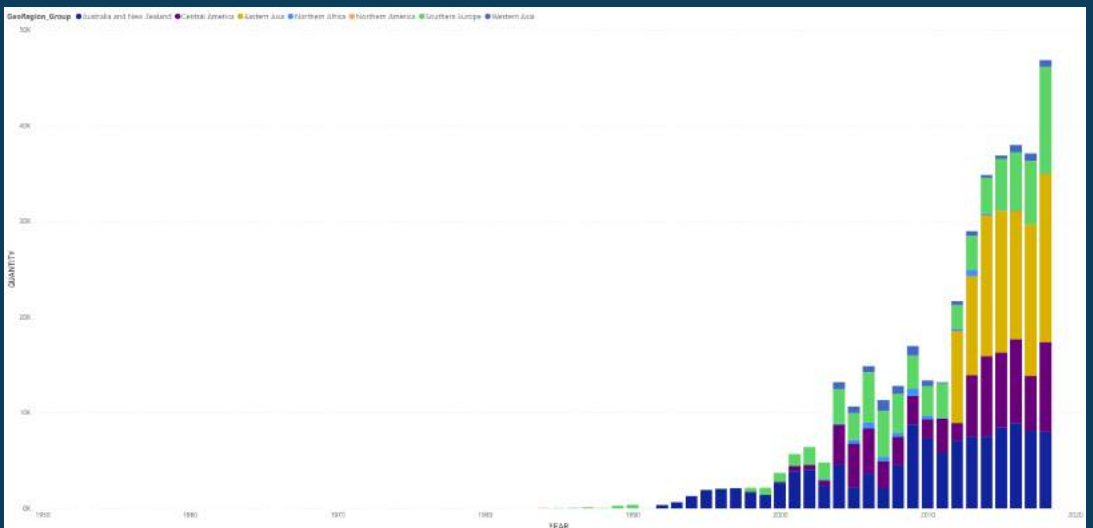
## Food and Agriculture Organization (FAO) Capture Production Quantity - Tunas, Bonitos, Billfishes

ASFIS Species: Tunas

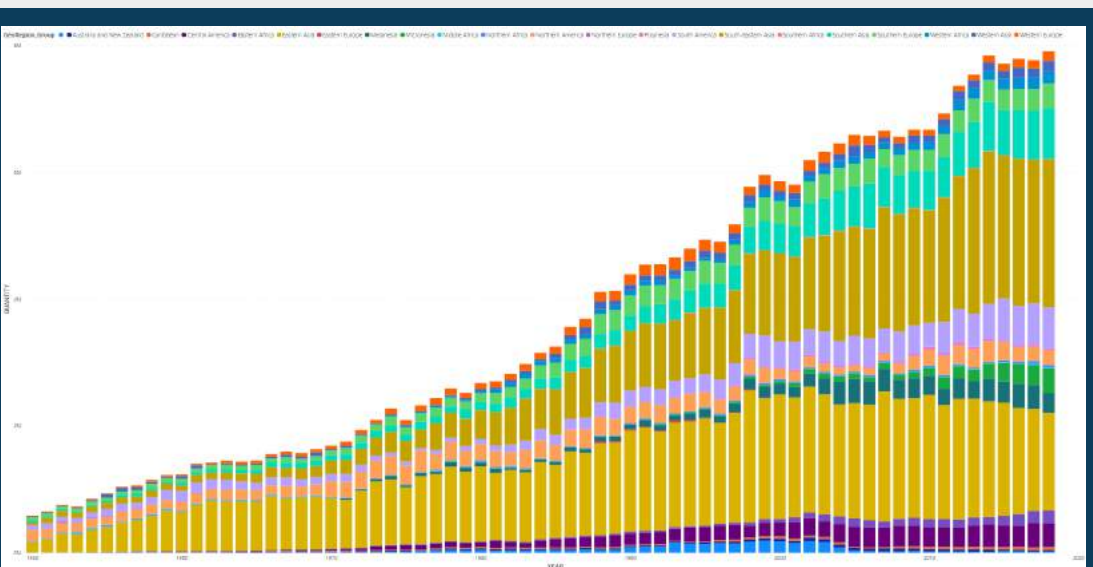
Production

Country Name En	Unit Name	2020
Australia	Tonnes - live weight	15,784
Japan	Tonnes - live weight	285,392

Production Volume by ASFIS Species - 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



# Contact Us

---

For more information please contact Seafood Industry Australia:

**Julie Willis**

**Trade Export Manager**

[julie@seafoodindustryaustralia.com.au](mailto:julie@seafoodindustryaustralia.com.au)

[info@seafoodindustryaustralia.com.au](mailto:info@seafoodindustryaustralia.com.au)

**Websites:**

[www.seafoodindustryaustralia.com.au](http://www.seafoodindustryaustralia.com.au)

[www.greataustralianseafood.com.au](http://www.greataustralianseafood.com.au)

