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Export Guide: **Japan**

Market Research Report





Department for
International Trade

Overseas Market Introduction Service
on the seafood market in Japan
for
Sea Fish Industry Authority



Department for International Trade

October 2020 Update: UK/Japan Trade Deal

The UK and Japan have agreed a historic new trade deal to be in place on 1 January 2021. This trade agreement goes further than the current EU/Japan trade agreement. For seafood, the current reduction in tariffs will continue. PGIs will remain protected, with more UK PGIs proposed for future protection.

Further details can be found on the [GOV.UK website here](#).



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1. EXECUTIVE SUMMARY

1.1 SUMMARY OF ENQUIRY

The Seafish Industry Authority commissioned this OMIS research report from the Department for International Trade (DIT) Japan team to carry out an update to the Japanese seafood market report compiled by DIT Japan in 2015 for the Seafish Industry Authority.

1.2 METHODOLOGY

We have used the following information sources to refer to market reports and figures and, when necessary, made enquiries by telephone or face-to-face, to clarify or obtain information:

- Japan Fisheries Agency
- Japan Customs
- Japan Tariff Association
- Japan Finance Corporation (JFC)
- The Ministry of Agriculture, Forestry and Fisheries (MAFF)
- The Ministry of Economy, Trade and Industry (METI)
- The Ministry of Internal Affairs and Communications
- Suisan Keizai Shimbun Co.
- Sumitomo Mitsui Banking Corporation (SMBC) (NB: Authors of SMBC Seafood Industry Overview Report used in this research)

In this report, to give you as direct a comparison as possible, we have tried to follow the same format as the previous OMIS report in 2015, but some changes in format were necessary. Please note there is some rounding in figures in statistics / tables.

1.3 OVERVIEW OF MARKET

Japan's seafood self-sufficiency rate was 57 – 60% in the period between 2012 and 2016, and has continued to decline over the period. Japan imports 40% of their total seafood consumption, mainly from China, the US, Norway, Chile, Thailand, Russia and Vietnam. The top imported seafood categories are Tuna, Salmon and Shrimps/prawns. In terms of UK exports to Japan, Mackerel, Salmon and Trout are the top 3 categories, while lobster and crab exports from the UK to Japan have been increasing in recent years.

In terms of global trends, the price of seafood has been increasing due to an emerging demand from China and India, as well as a growing emphasis on the health benefits of seafood in western countries. Seafood prices in Japan have also become more expensive, which is

leading Japanese consumers to eat less seafood in order to maintain the same budget. There is a common belief among Japanese consumers that seafood is more expensive than meat these days. Several local surveys show (details are in the section 3.4 Consumer Trends), that Japanese consumers want to continue eating seafood as it has been their part of the Japanese diet traditionally and fish is considered to be healthier than meat. However, budget considerations mean they are having to eat less of it (and consequently eating more meat).

It is a competitive market with many import competitors, but there is always a strong demand for seafood among consumers and there is a strong interest in those products with clear USPs.

2. THE TRADE ENVIRONMENT

2.1 JAPAN GENERAL ECONOMY

Population (2018)	127 million
Land area	377,962 sq km
Inhabitants per sq km (2015)	340.8
Number of households (2018)	58 million
Average family number per household (2018)	2.20 people
Capital	Tokyo
Main cities other than the capital (in the order of the population)	Yokohama, Osaka, Nagoya, Sapporo, Kobe, Fukuoka, Kawasaki
Languages	Japanese
Religion	Mostly Shinto or Buddhism
Currency	Japanese Yen
Exchange rate (as of February 2019)	£1=143 yen
Government	Liberal Democratic Party of Japan
Real GDP (2017 FY)	531678.1 billion yen (ranked No.3 after the US and China)
Real GDP growth rate (2017FY)	1.9%
Nominal GDP per capita (2017FY)	4,321 yen
Consumer price index (2017)	0.5%
Unemployment rate (2018) (Seasonally adjusted)	2.4%

2.2 JAPAN TRADE STATISTICS

JAPAN TRADE STATISTICS (2017)

Total Imports	75,379 billion yen
Of which, imports of agricultural, forestry and fishery products	9,373billion yen
Of which, imports of fishery products	1,775 billion yen
Total Exports	78,287 billion yen
Of which, exports of agricultural, forestry and fishery products	807 billion yen
Of which, exports of fishery products	275 billion yen
Top three countries from which Japan imports agricultural, forestry and fishery products	1. United States (18.3%) 2. China (12.9%) 3. Thailand (6.1%)
Top three countries from which Japan imports fishery products	1. China (17.9 %) 2. United States (9.3%) 3. Chile (8.9%)

Source: Ministry of Agricultural, Forestry and Fishery

Statistical Handbook of Japan 2018

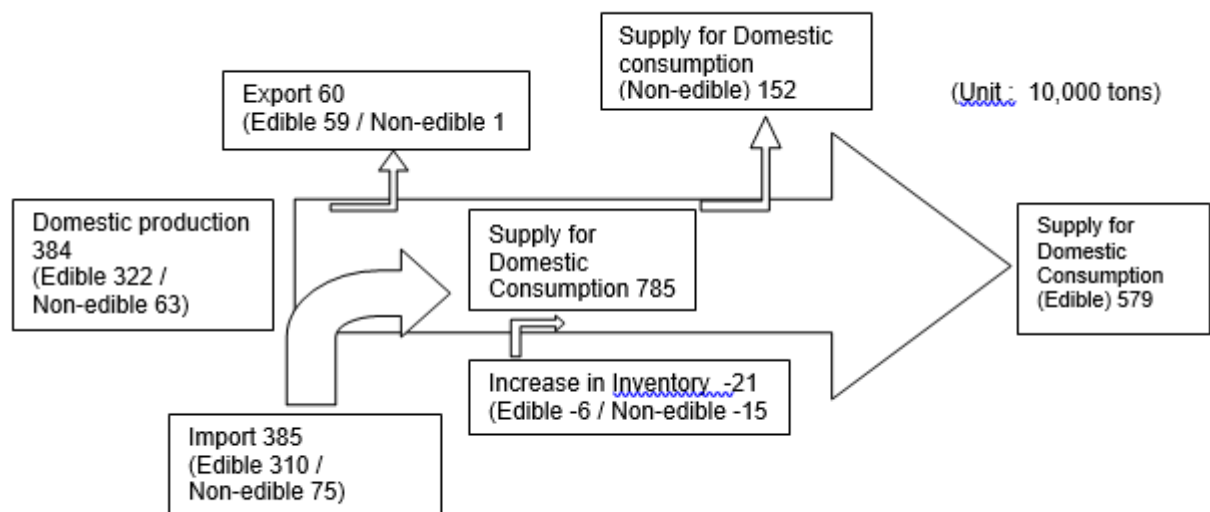
This is published by the Japan Statistics Bureau to provide an overview on Japan through statistics. You will be able to find, not only trade figures, but also other information on Japan including household expenditure, price trends, etc. They publish in English.

<http://www.stat.go.jp/english/data/handbook/c0117.html#c11>

3. JAPAN SEAFOOD MARKET

3.1 JAPAN SEAFOOD SUPPLY AND DOMESTIC PRODUCTION

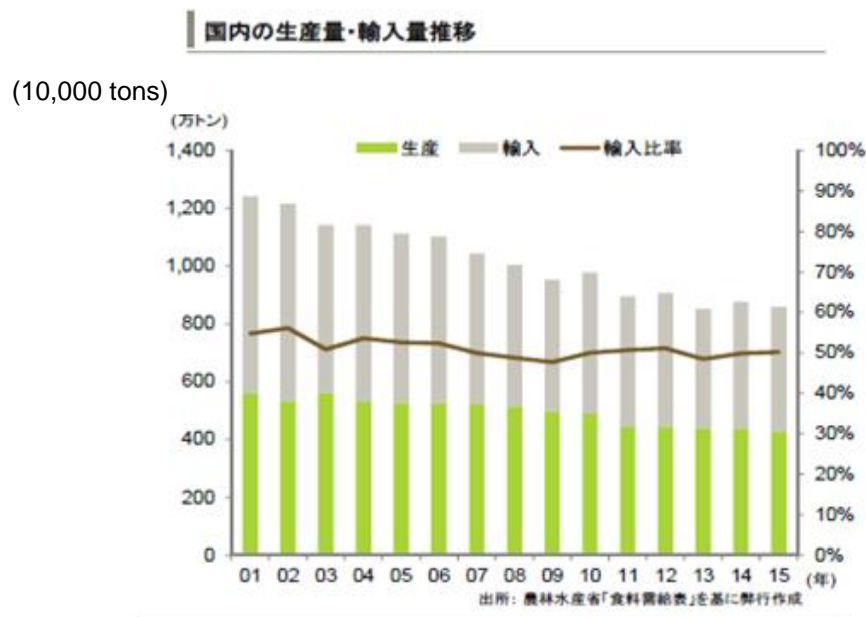
Estimated seafood supply for domestic consumption in FY2016 was 7.85 million tons, of which, 79% (5.79 million tons) was for edible use. The remaining 21% (1.52 million tons) was for non-edible uses such as manure. Domestic production of seafood was 3.84 million tons in 2016 (25% decrease compared to 2006) and seafood imports were 3.85 million tons (33% decrease compared to 2006). Seafood supply in 2016 has decreased by 2.59 million tons (26% decrease) compared to the previous year.



Source: Japan Fisheries Agency, White paper 2016

Change in domestic production and import volume

Green: Domestic production volume / Grey: Import volume / Brown line: import rate



Source: SMBC report - Seafood Industry Overview, 2017

Japanese fishery and aqua farming production volume decreased by 6% in FY2016 compared to the previous year. For marine fishery, the production volume of pilchard (spot-lined sardine) increased, while salmon and sagittated calamari decreased. This is believed to have been caused by decreases in marine resources due to environmental changes. For aqua farming, the production volume of sea squirt increased while scallop decreased.

However, in terms of value, production value in FY2016 was 1,586 billion yen which is similar to previous years. For marine fishery, production value was 962.1 billion yen (a 3% decrease from previous year) which is thought to have been affected by reduced catches of bigeye tuna, albacore and calico salmon. For aqua farming, production value was 510 billion yen in 2016 (a 4.8% increase from previous year) which is thought to have been affected by a rise in demand for seaweed and a steady rise in the price of red sea bream.

Japanese Seafood Production (Fishery & Aqua Farming)

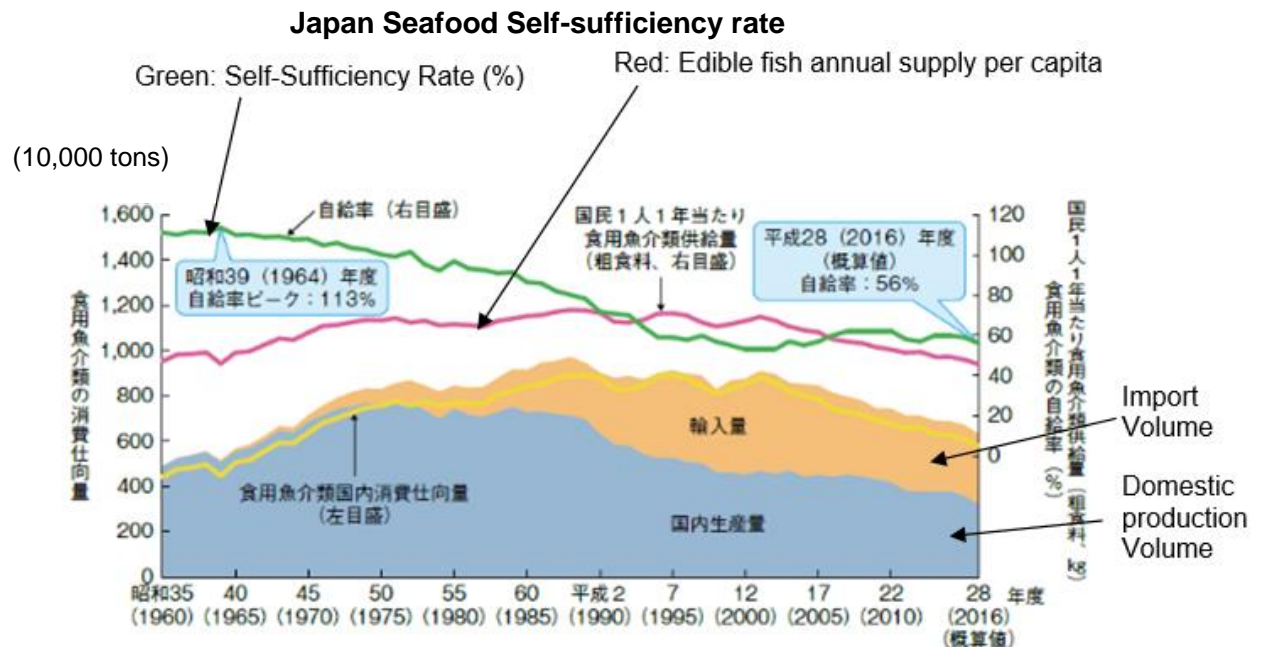
	2006	2014	2015	2016	2016/15
Production Volume (1,000 ton)	5,735	4,765	4,631	4,359	-5.9%
Of which Sea water	5,652	4,701	4,561	4,296	-5.8%
Marine fishery	4,470	3,713	3,492	3,264	-6.6%
Aqua farming	1,183	988	1,069	1,033	-3.4%
Of which Fresh water	83	64	69	63	-8.8%
Production Value (billion yen)	1,606	1,503	1,586	1,586	0.0%
Of which Sea water	1,528	1,411	1,482	1,472	-0.7%
Marine fishery	1,079	963	996	962	-3.4%
Aqua farming	450	444	487	510	4.8%
Of which Fresh water	78	93	103	114	+9.8%

Source: Japan Fisheries Agency, White paper 2016

Sea Water Fishery Volume and Value by Major Categories

		2006	011	2012	2013	2014	2015	2016	2016/ 2006	2016/ 2015
Volume (1,000 ton)	TOTAL	4,470	3,824	3,759	3,734	3,713	3,492	3,264	-27.0	-6.6
	Tuna	220	201	209	189	190	190	168	-23.5	-11.3
	Billfish	18	17	17	16	15	15	14	-20.6	-3.2
	Bonito	358	282	316	300	266	264	240	-33.0	-9.2
	Salmon/ Trout	231	148	134	170	151	140	112	-51.6	-20.1
	Sardine	554	570	528	611	579	642	710	28.2	10.6
	Horse mackerel	191	193	158	175	162	167	153	-20.2	-8.4
	Mackerel	652	393	438	375	482	530	503	-23.0	-5.2
	Skipper	245	215	221	150	229	116	114	-53.5	-2.1
	Yellowtail	69	111	102	117	125	123	107	53.9	-13.0
	Flatfish	63	55	53	53	52	49	50	-20.1	2.6
	Cod	254	286	281	293	252	230	178	-29.9	-22.6
	Atka mackerel	116	63	69	53	28	17	17	-85.1	1.2
	Red Snapper	26	28	26	23	25	25	25	-6.3	-1.4
	Squid	286	298	216	228	210	167	110	-61.6	-34.2
	Scallop	272	303	315	348	359	234	214	-21.4	-8.6
	Others		661	667	616					
		2006	2011	2012	2013	2014	2015	2016	2016/ 2006	2016/ 2015
Value (billion yen)	TOTAL	1,078	940	916	948	966	995	962	-10.8	-3.4
	Tuna	151	123	122	108	117	132	117	-23.0	-11.9
	Billfish	11	10	10	9	10	11	10	-8.7	-2.7
	Bonito	62	63	74	73	73	72	67	4.0	-3.2
	Salmon/ Trout	83	70	63	72	73	72	67	-19.3	-7.6
	Sardine	54	50	62	56	60	65	65	20.7	0.5
	Horse mackerel	40	38	35	37	36	36	32	-19.2	-9.8
	Mackerel	40	38	38	42	36	36	32	5.5	-3.6
	Skipper	17	23	17	23	26	25	26	55.4	2.5
	Yellowtail	27	30	25	28	34	34	30	11.6	-12.6
	Flatfish	40	29	26	25	26	26	26	-36.3	-2.0
	Cod	34	23	25	23	30	32	26	-23.9	-19.2
	Atka mackerel	7	5	6	5	6	5	4	-39.1	-7.2
	Red Snapper	19	17	16	15	15	16	12	-21.1	-1.0
	Squid	90	82	65	78	72	65	66	-26.5	1.3
	Scallop	40	43	39	61	62	58	63	59.5	8.1
	Others	361	296	293	292	295	306	304	-15.3	0.1

Japan's seafood self-sufficiency rate reached a peak in 1964 at 113%. It has then declined on a continual basis until around 2000 when it hit its lowest level at 53% over the period between 2000 and 2002. The self-sufficiency rate in FY2017 was 56%, 3% less than the previous year, mainly due to a decrease in domestic supply of seafood. Both imports and domestic supply have seen a decrease in recent years.

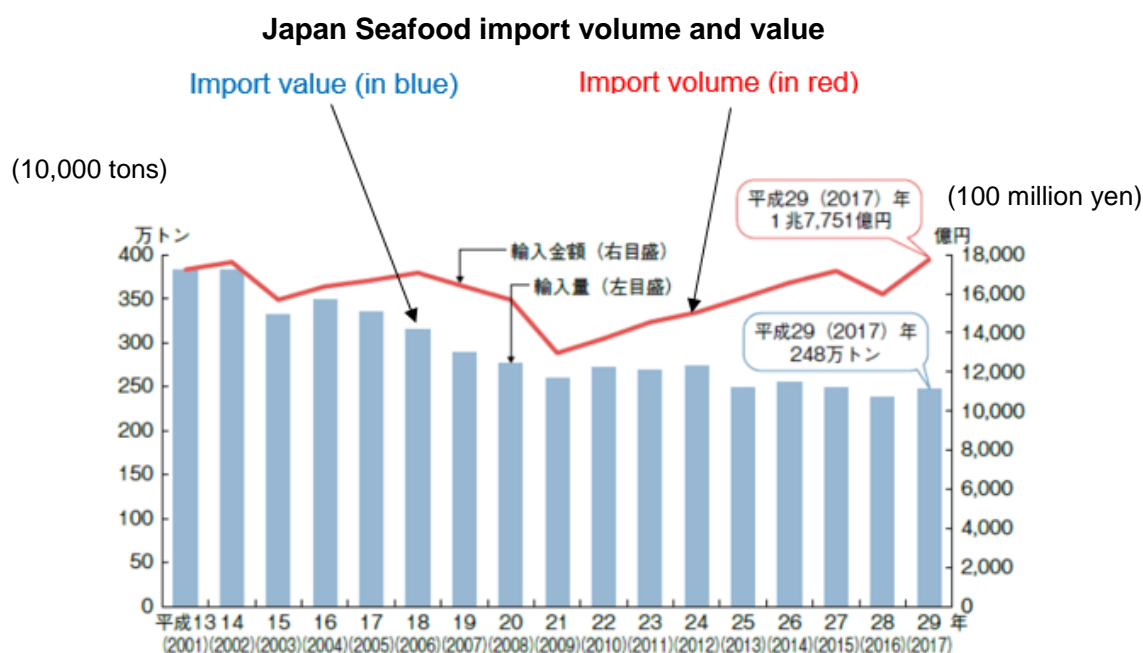


Source: Japan Fisheries Agency, White paper 2016

3.2 JAPAN SEAFOOD IMPORTS

Japan's import volume of fishery products in 2017 was 2,480,000 tons, a 4% increase compared to the previous year and it accounted for 18.9% of the total import of agricultural, forestry and fishery products.

The largest volume on record was 3,820,000 tons in 2001. Following that, volume declined until 2009, mainly due to a decrease in domestic consumption. Since 2009 it has made a slight recovery, rising sharply between 2016 and 2017 to volumes more than in 2001.



Source: Japan Fisheries Agency, White paper 2016

In terms of volume, China is the largest overseas supplier to Japan, followed by the US and Chile. China is the largest supplier of prepared fish (cuts, fillets etc) to Japan. China and Taiwan are the largest supplier of tuna to Japan; Chile and Norway are the largest suppliers of salmon; and Vietnam, India and Indonesia are the largest suppliers of shrimps/prawns.



Source: Japan Fisheries Agency, White paper 2016

Major imported seafood products from top 3 export countries

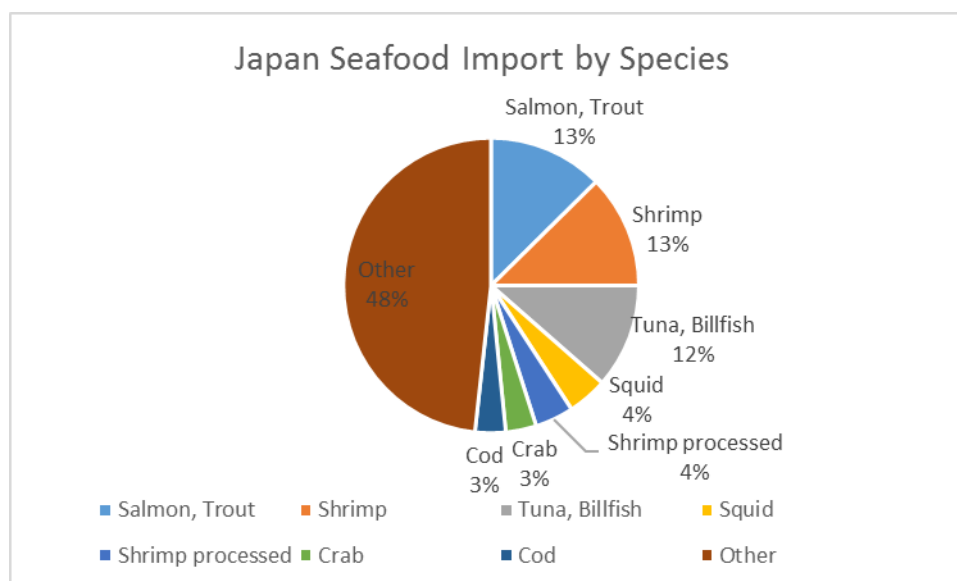
(unit: billion yen)

	2016	2017	Y/Y(%)
China (excluding HK and Macao)	2,881	3,169	10.0
Eel related products	211	333	58.0
Squid related products (excluding airproof type)	301	326	8.4
Tuna and Sword fish (frozen)	276	312	13.1
USA	1,362	1,658	21.7
Cod (including minced fish, frozen)	416	486	16.8
Cod roe	100	131	31.1
Salmon / Trout (fresh chilled, frozen)	98	116	18.6
Chile	1,206	1,575	30.6
Salmon / Trout (fresh chilled, frozen)	961	1,283	33.4
Sea urchin (fresh chilled, frozen)	60	78	28.9
Fish flour	33	47	42.6

Source: Japan Fisheries Agency, White paper 2016 (based on Trade statistics by Ministry of Finance)

Japan Seafood Import – By Category

Salmon/trout, shrimp, tuna/swordfish, squid, processed shrimp and cod were the top six imported categories by value, accounting for 62.51% of total import value in 2016.

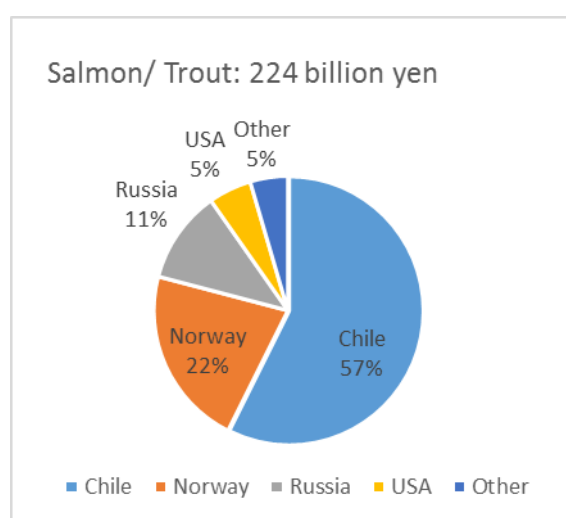


Source: Japan Fisheries Agency, White paper 2016

The following charts show a breakdown by country for each of the five categories in the order of import value ranking. Out of the top five, the UK does well at exporting salmon, but not to compete with the top exporting countries.

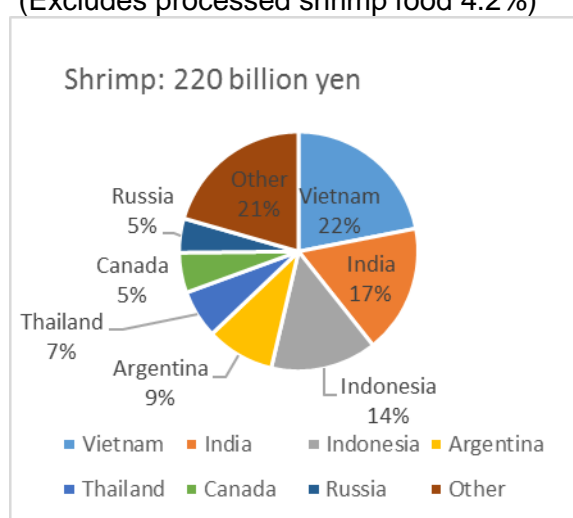
Japan relies on imports for the supply of Atlantic salmon. The Japanese Atlantic salmon import market is dominated by Norway and Chile, accounting for 90% of the total volume. While 80% of Norwegian Atlantic salmon is sold in supermarkets, most Chilean Atlantic salmon is sold to the food service industry in areas such as inexpensive sushi chains. Atlantic salmon from other countries which is more expensive is typically sold to high-end restaurants.

No. 1 Salmon/ Trout (13%)

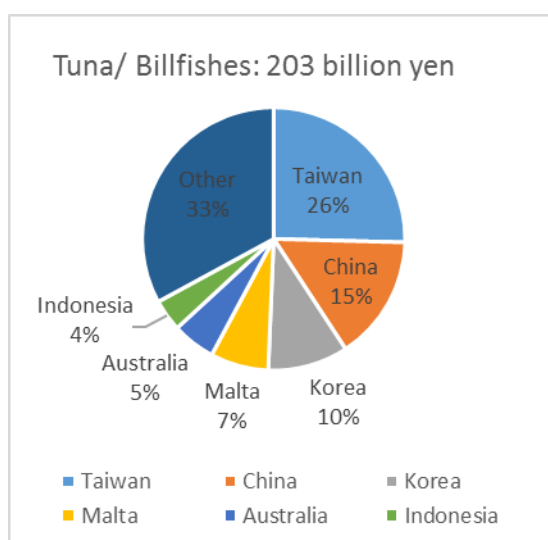


No. 2 Shrimp (13%)

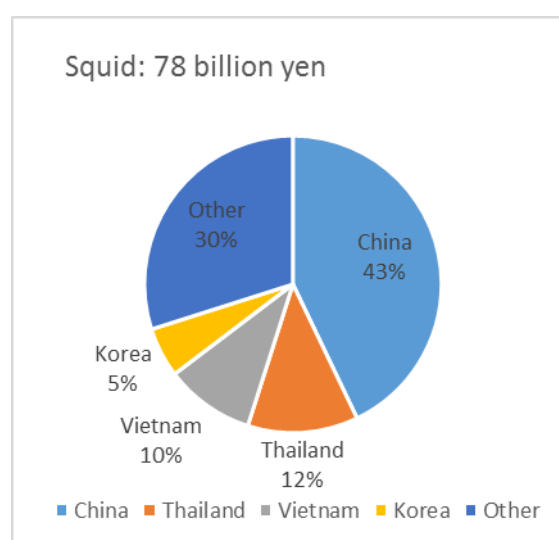
(Excludes processed shrimp food 4.2%)



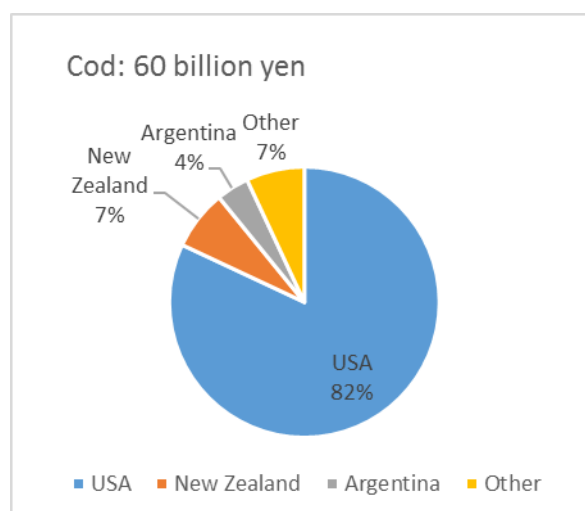
No. 3 Tuna/ Billfishes (12%)



No. 4 Squid (4%)



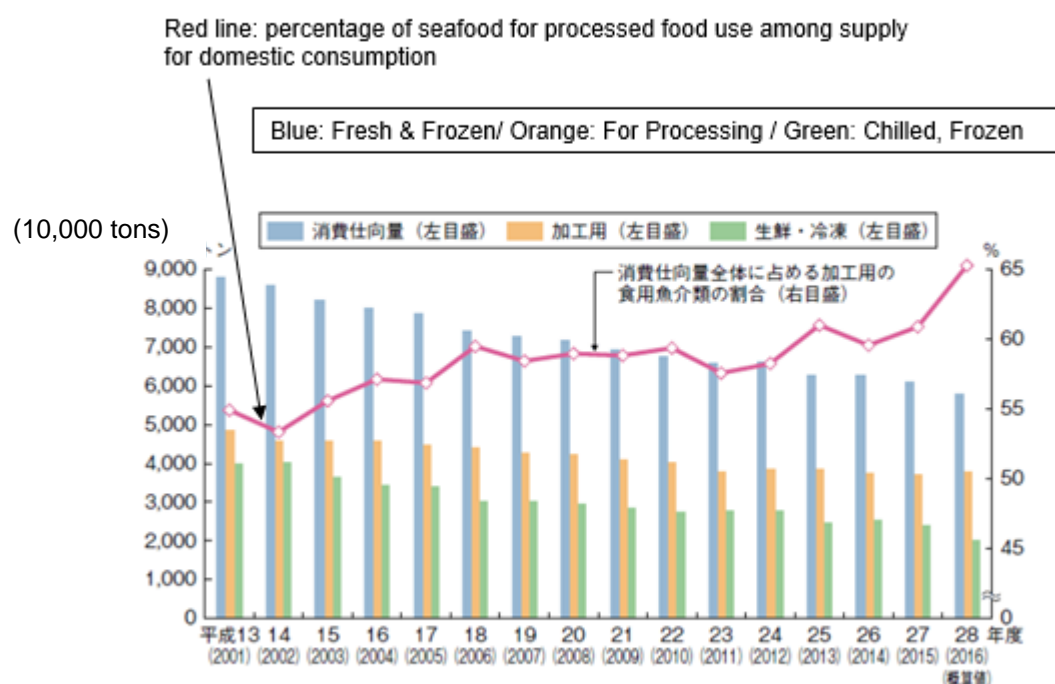
No. 5 Cod (3%)



3.3 DOMESTIC CONSUMPTION

While the consumption volume for fresh and frozen edible seafood has been decreasing, the consumption volume for processed seafood has remained fairly steady. As a result, the ratio of consumption volume for processed seafood against overall consumption volume has increased as below.

Change in Seafood Supply for Domestic Consumption



Source: Japan Fisheries Agency, White paper 2016

Fish paste accounts for roughly half of the total processed seafood followed by canned seafood. Demand for pre-cooked fish paste products has grown recently, as they meet the demand of modern day consumers who opt for convenient and time-saving items.

Canned fish products have also become increasingly popular over the last few years among health conscious consumers in Japan as it became widely promoted that they contain nutrients such as docosahexaenoic acid (DHA) and eicosapentaenoic acid (EPA) which are said to be good for beauty and health.

The majority of other processed seafood products saw a slight decline in market value. Sales of smoked salmon have shrunk over the years as there has been less demand for this high value product.

3.4 CONSUMER TRENDS

As seen in the charts below, the volume of annual seafood consumption per capita peaked at an all-time high in 2001 with 40.2 kg. This links to the outbreak of BSE in Japan and meant that consumers avoided beef, shifting towards seafood. However, since then it has continued to decline to 24.6kg per capita in FY2016, which was 1.1kg less than previous year.

There are several factors which those in the industry consider are contributing to the decrease in seafood consumption in Japan:

- Population Decrease: The population in Japan is decreasing and Japan faces a fast growing aging society – this is leading to less consumption of food in general.

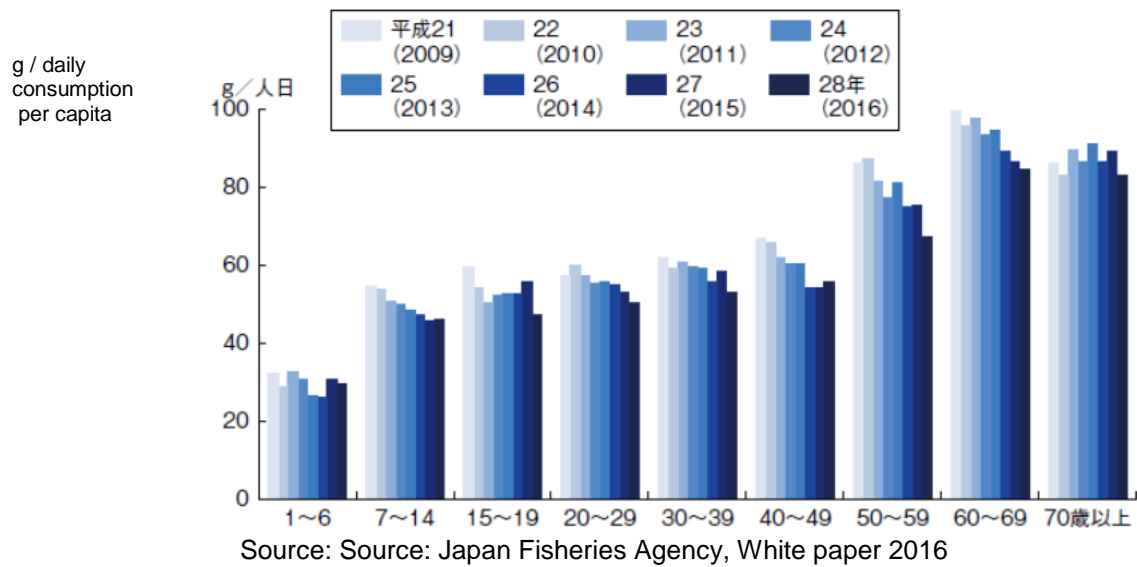
- Westernisation of diet: Changes in tastes of younger Japanese consumers and dietary habits in general have led to an increase in meat consumption and decrease in consumption of traditional Japanese food including seafood. Also imported meat has become less expensive thanks to the recently made trade agreements such as TPP11.

- Seafood consumption volume of among the younger generation under 40 is smaller than that of older generations and is slowly decreasing. However, consumption volume of those in their 50s and 60s has also seen a decline in recent years.-According to analysis by the Ministry of Agriculture, Forestry and Fisheries, based on food supply and demand statistics, the intake volume of protein has been decreasing in recent years, which is considered to have been affected by the aging society and the increase in diet conscious consumers.

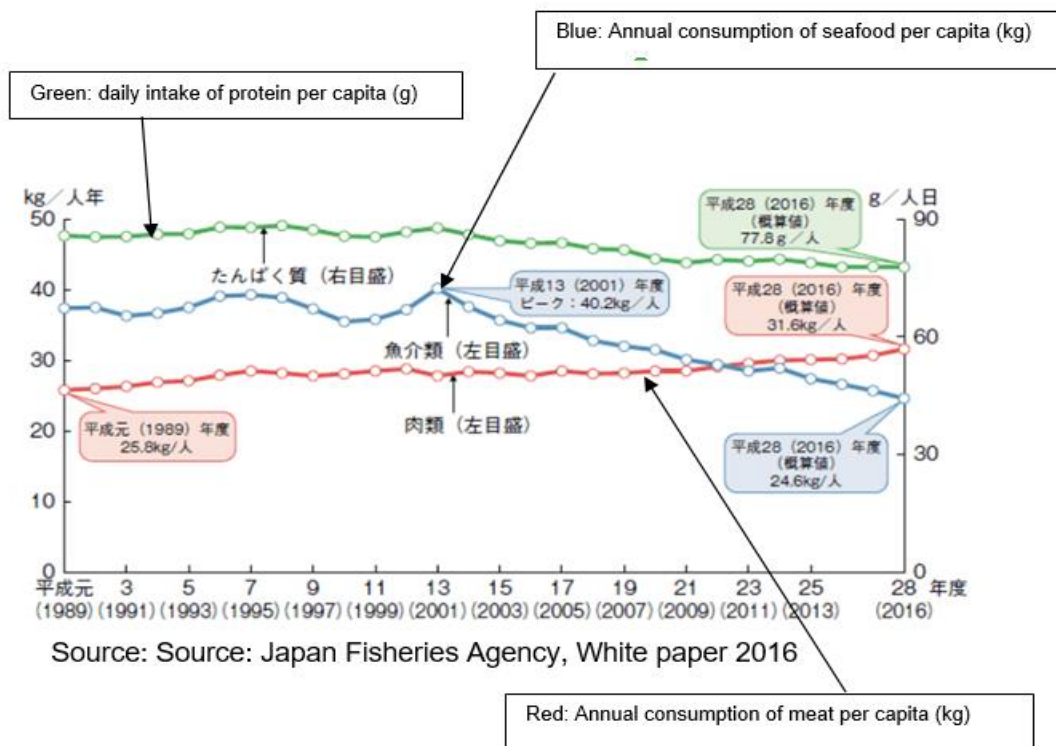
- A steep rise in the retail price for fresh seafood from around 2013 has led to decrease of purchase volume for fresh seafood. (The price index for seafood is higher than that of meat.)

- According to a consumer survey conducted by the Ministry of Agriculture, Forestry and Fisheries (MAFF) published in 2018, the most frequently purchased food by Japanese consumers was meat (41.1%) followed by seafood (34.0%).

Consumption of seafood per capita by generation

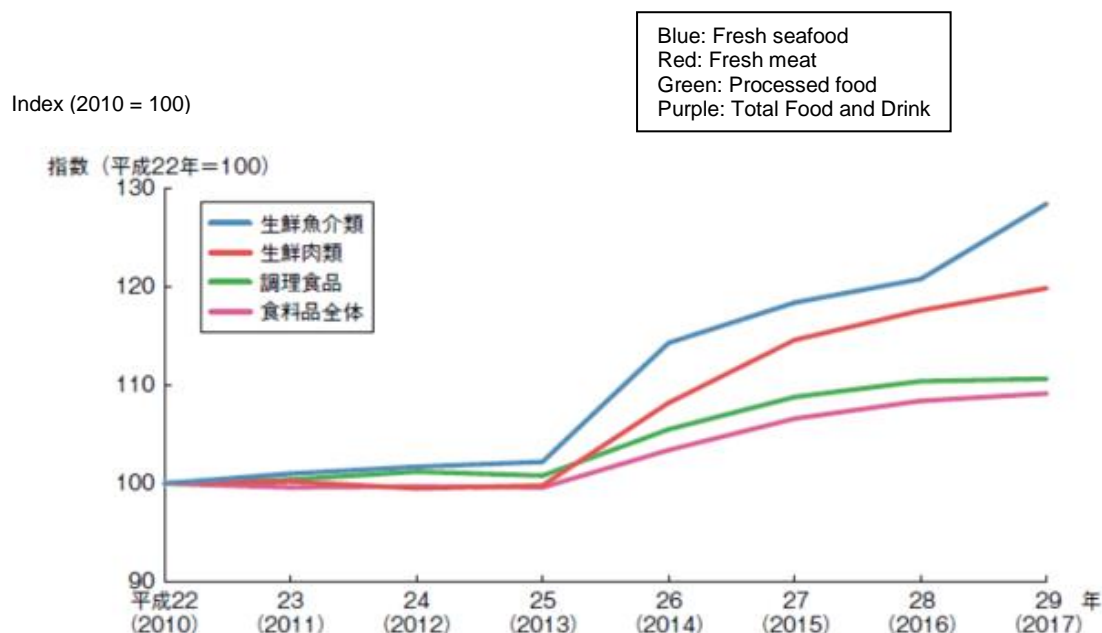


Consumption of seafood and meat annual per capita and changes in daily intake of protein per capita



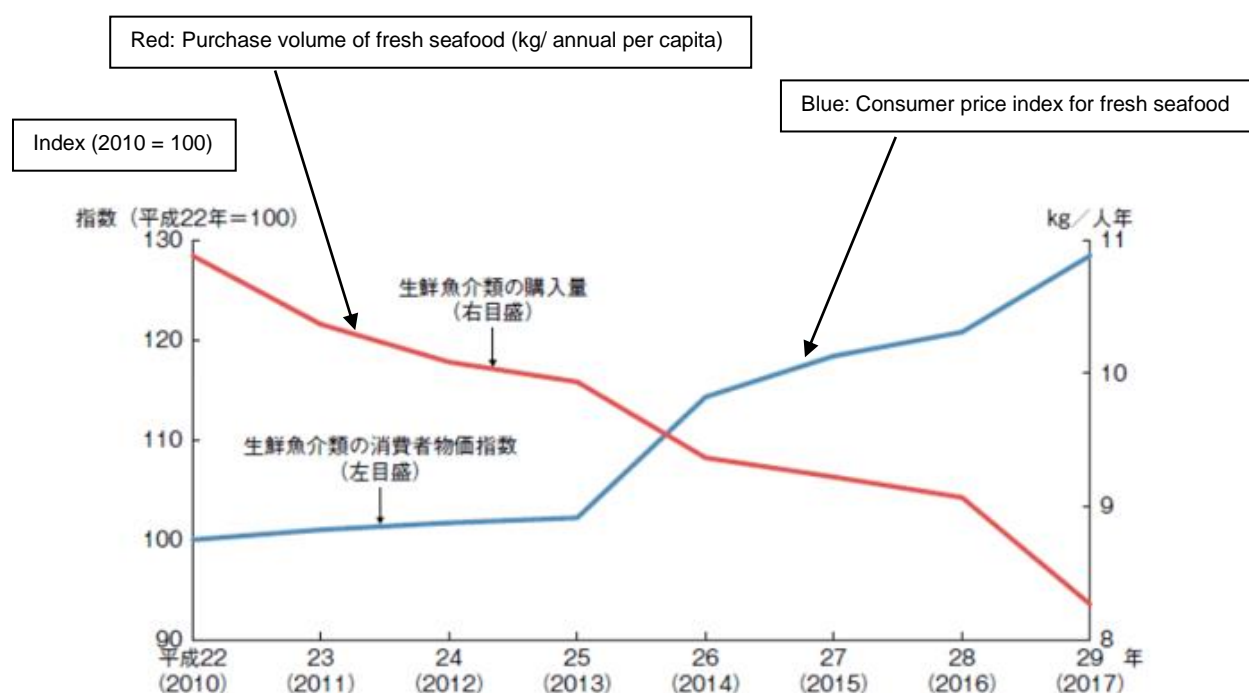
While the overall price of food has risen, the retail price of fresh seafood and fresh meat (although less than fresh seafood) has seen a particularly steep rise. The purchase volume of fresh seafood has decreased in proportion to the rise of retail price.

Changes to consumer price index



Source: Japan Fisheries Agency, White paper 2016

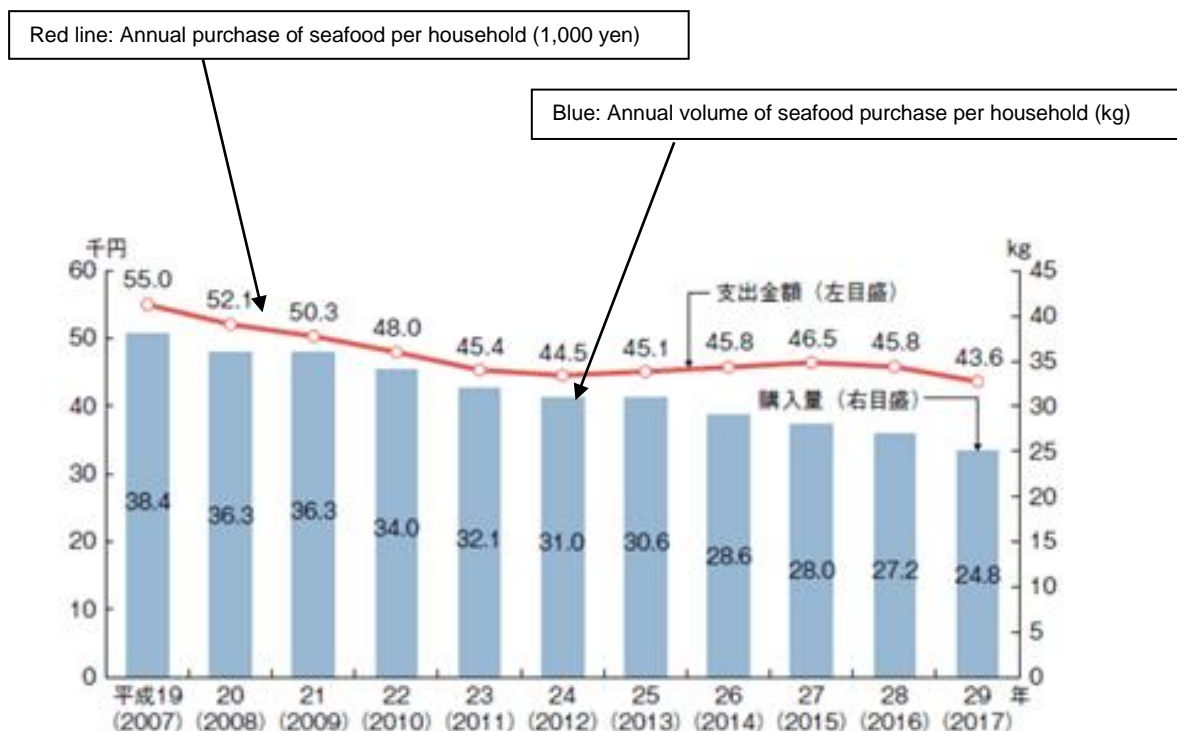
Changes to consumer price index and annual purchase volume for fresh seafood per capita



Source: Japan Fisheries Agency, White paper 2016

On the other hand, annual expenditure on fresh seafood per household has remained at the same level despite consumption volume decreasing. MAFF suggests that this illustrates that Japanese consumers are very willing to buy seafood, but can only buy a limited amount due to household budgets. As a result, the annual seafood consumption per capita has declined.

Changes in Annual Seafood Consumption Value per Household

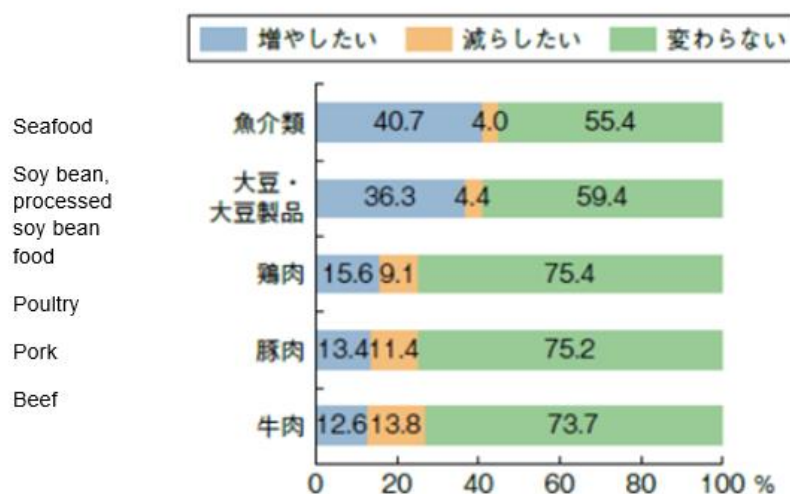


Source: Japan Fisheries Agency, White paper 2016

While consumption of seafood is continuing to decrease, the survey below shows consumers' wish to eat more seafood.

Consumer's mind on volume of main dishes

Blue: want to eat more / Orange: want to eat less / Green: want to continue to eat same volume



Source: Consumer mind research report 2016, Japan Finance Corporation

Another question in the survey suggests there is a strong need for easy to cook products.

Consumers mind on cooking dishes

Wish to simplify the cooking process as much as possible

Wish to cook good tasting dish

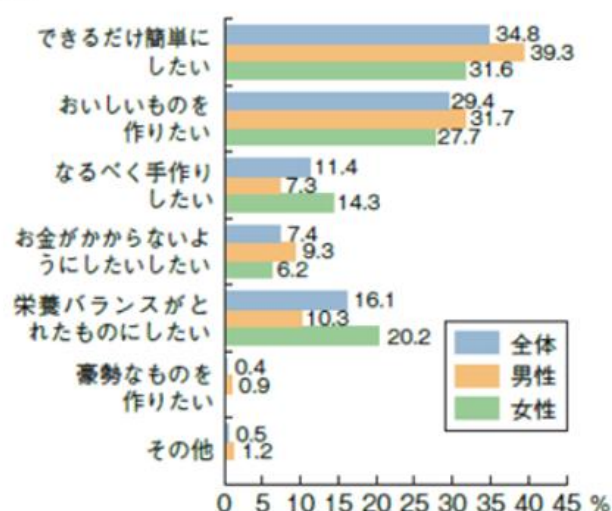
Wish to prepare home-made food where possible

Wish to spend less money as possible

Wish to eat nutritiously balanced dish

Wish to prepare lavish dish

Other



Source: Consumer mind research report 2016, Japan Finance Corporation

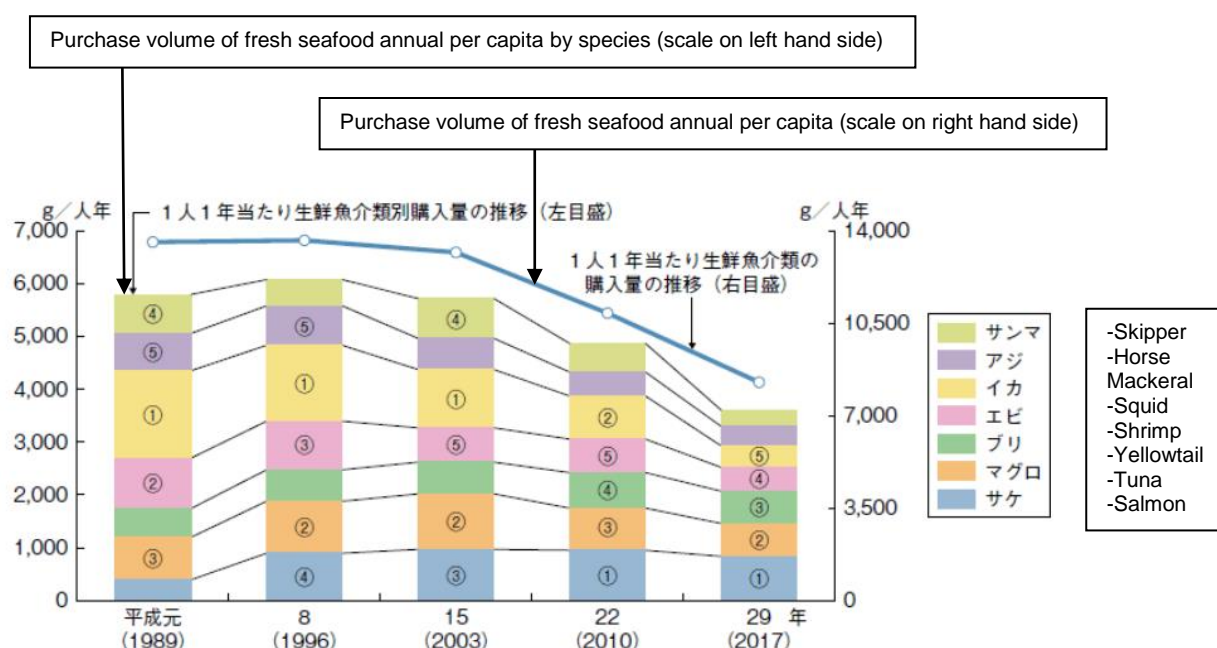
Modern day consumers are increasingly seeking convenience foods and there is a growing preference for products that have already been prepared in some form (such as cut or sliced, unboned, etc.) or pre-cooked. To cater to such demand, major retailers such as Aeon and Seven & I Holdings have started selling ready-made meals (such as cooked mackerel with miso sauce) which can easily be prepared by microwave. These products have also proved to be popular among the older generation who are tending to cook less after their children have left home.

Processed seafood such as fish paste and canned seafood have become popular in recent years.

The chart below shows the changes to volume and preferred types of fresh seafood consumed from 1989 onwards. Squid and shrimp were the most purchased type in 1989 however it has been replaced by salmon, tuna and yellowtail, which are often sold in fillets, more recently.

While many categories have seen a decrease in volume purchased, salmon and salted salmon have maintained a high purchase rate. Types of fish which are sold in fillet form such as salmon, are consumed steadily, despite the overall decrease in seafood consumption, and the consumption volume is less affected by the price increase.

Changes in Volume of Annual Consumption of Fresh Seafood per capita



Source: Japan Fisheries Agency, White paper 2016

Public - private campaigns to promote seafood consumption

In order to increase seafood consumption by Japanese consumers, there have been an increase in the number of campaigns and seafood promotions in the Japanese market. The Japanese Fishery Agency and MAFF has launched the 'Fast Fish' project and the National Federation of Fisheries Co-operative Association has launched the 'Pride Fish' project. These projects are/aim to increase seafood consumption by promoting seafood development of seafood product to match consumers' various demands. 'Fast Fish' is defined as prepared seafood products for quick and easy cooking. 'Pride Fish' www.pridefish.jp (website in Japanese language only) is defined as seafood for consumers who are fussy about taste and quality. The rationale behind these campaigns is that a wide range of choice for consumers will help them enrich their food life: e.g. eat 'Fast Fish' on busy weekdays for convenience, but try to cook 'Pride Fish' to make tasty dishes at weekend.

Japanese society is still relatively conservative and women are still either primary homemakers, doing the majority of the housework even if they work outside the home, or do not work outside the home. This is gradually changing, and as more women are expected to work outside the home in the future than currently do, so demand for easy to prepare food products (such as 'Fast Fish' type) may continue to grow. There is also demand for easy cooking food among young singles who do not cook at home or the older generation who are cooking less.

On the other hand, people who like to cook are willing to prepare meals spending a certain amount of time (as seen in the survey "Consumer's mind on cooking dishes", about 30% of people wish to cook good tasting dishes and 10% wish to prepare homemade food). Therefore, the Japanese seafood industry thinks it is necessary to offer not only easy-cooking products to time-poor consumers, but also to offer ingredients with recipes for people to enjoy cooking. Providing different approaches to meet consumers' different demands is a key to encourage them to eat more seafood.

Rise of canned seafood (“Fast Fish”)

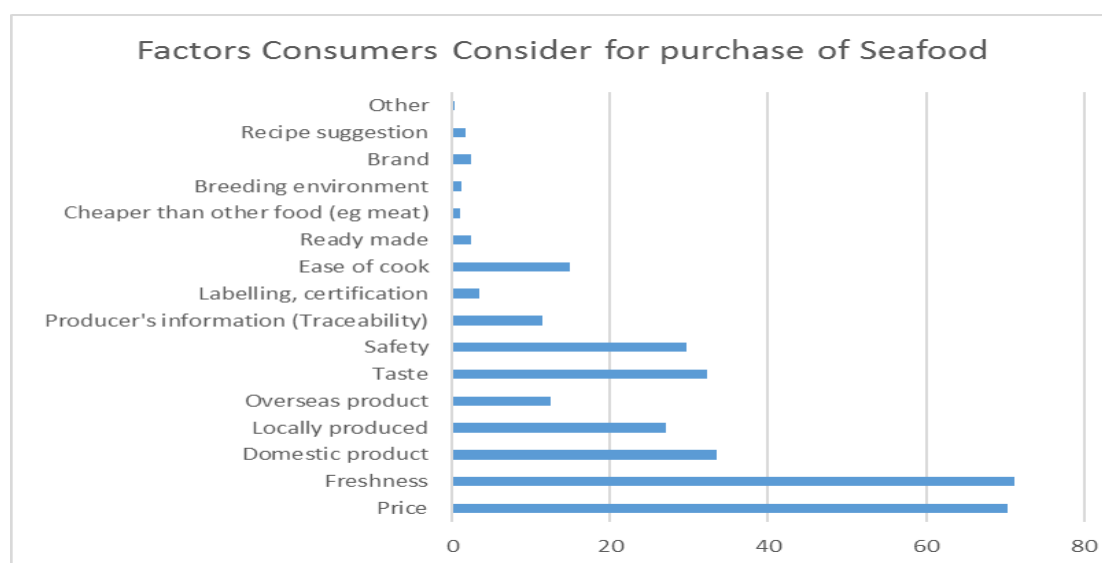
It has been widely promoted among Japanese consumers that seafood contains docosahexaenoic acid (DHA) and eicosapentaenoic acid (EPA) which are good for health. Based on this, people would like to cook more seafood for their meals. Canned mackerel became very popular in Japan from 2013 when it was widely promoted as a good source of DHA and EPA which stimulate cells to release the GLP-1 hormone, known as the “diet hormone”. This triggered popularity among health conscious women in particular, and in 2016 canned mackerel became the number one canned fish meat.

Factors driving consumers at point of purchase

According to a consumer survey conducted by Japan Finance Corporation, Japanese consumers purchasing decisions of seafood are based on:

- Freshness (71.2%)
- Prices (70.4%)
- Country of origin (preference for domestic product (33.5%)
- Local produce (27.1%).
- Ease of cooking (14.9%)

Food safety factors have become less of a priority in recent years compared to 2015 when it was the 2nd priority after freshness.



Source: Consumer's mind research 2015, Japan Finance Corporation

Safety management for seafood

In terms of safety information for consumers, suppliers are expected to manage the production/processing process in order to confirm safety, and also to provide consumers with comprehensive information about how they are ensuring safety. In Japan, several incidents of foreign material being found in various food products have been reported in the media in recent years. This has led to a further increase in safety awareness. The following four areas are of particular concern to Japanese consumers:

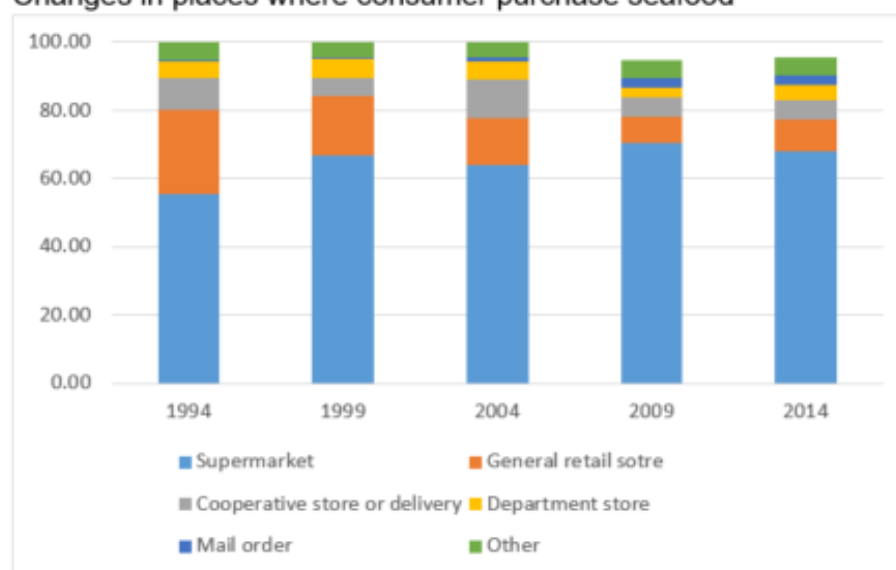
- Clear traceability (where the products were grown/produced and how they are cooked)
- GM foodstuffs (some US imports have this issue)
- Radioactive caesium contained in foodstuff
- Additives

3.5 RETAIL CHANNELS

The chart below shows the main retail channels used by Japanese consumers to buy seafood. Nearly 70% buy at supermarkets (General Merchandise Stores) based on latest figures (2014) from the National survey of family income and expenditure. The survey is conducted by the Ministry of Internal Affairs every 5 years and the next report is due this year in December 2019.

According to commercial statistics published by the Ministry of Economy, Trade and Industry, the number of fresh seafood speciality stores (fishmongers) decreased to 7,520 in 2014, while there were over 24,800 shops in 1994.

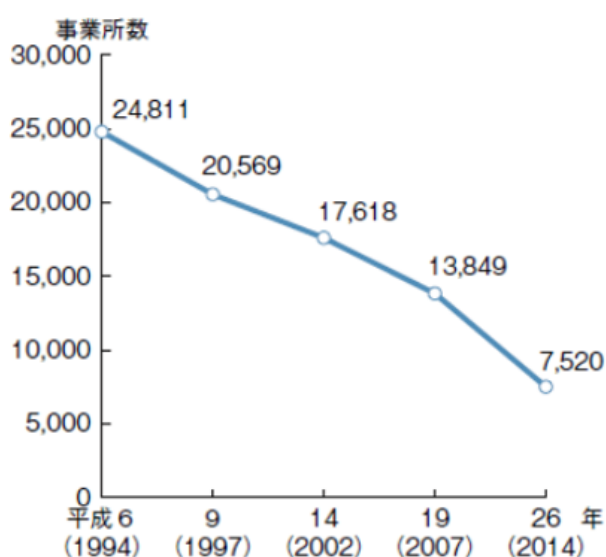
Changes in places where consumer purchase seafood



Source: National survey of family income and expenditure 2014, Ministry of internal affairs

Change in the number of seafood specialty store

Number of outlet



Source: Commercial Statistics, Ministry of Economy and Trade and Industry

Consumers are increasingly turning from fishmongers to supermarkets as their preferred outlet to purchase seafood. This will in turn likely have an impact on consumers' choice.

Supermarkets mainly sell fillets and slices, and less whole fish. Unlike speciality shops (fishmongers) there is less opportunity for consumers to become familiar with rarer fish/seafood as there is no one in the shop to provide advice on how to prepare and cook the fish. They may also choose meat over fish as it is often perceived as easier to cook as well as being able to purchase more volume than fish/seafood with the same amount of money. In addition to using the JFC survey results, throughout the course of our research, we also discussed with industry the major merits for buying at General Merchandise Stores (GMS) and they were found as below:

- Able to buy seafood and other foodstuff at the same place and time
- Wide range of easy to prepare products available
- Prices are generally cheaper
- Close to home

Overall, convenience is the key word.

Speciality shops have other benefits for consumers:

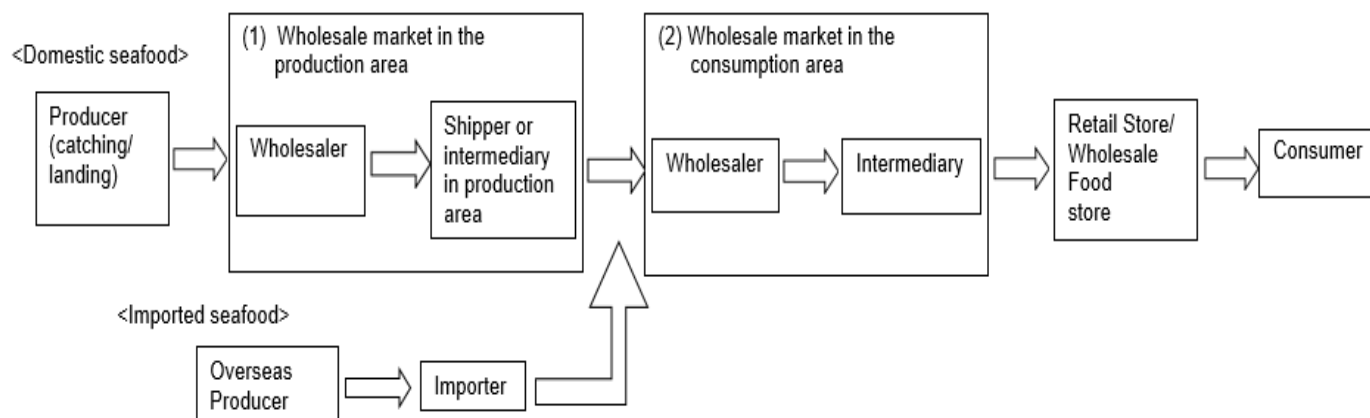
- Generally have higher freshness and quality
- Good service to cut fish for fillet / sashimi (sliced raw fish) according to each customer's request on the spot
- Experienced sales' person with information such as how to cook and which fish is in season
- Whole fish with head is available

Consumers appreciate the more personal approach they get and vibrant atmosphere found in speciality shops.

But, despite the benefits of speciality shops, consumers are increasingly turning from fishmongers to supermarkets as their preferred outlet to purchase seafood. This will in turn likely have an impact on consumers' choice. Supermarkets mainly sell fillets and slices, and less whole fish. Unlike speciality shops (fishmongers) there is less opportunity for consumers to become familiar with rarer fish/seafood as there is no one in the shop to provide advice on how to prepare and cook the fish. They may also choose meat over fish as it is often perceived as easier to cook as well as being able to purchase more volume than fish/seafood with the same amount of money.

3.6 SUPPLY STRUCTURE

The Japanese seafood wholesale markets have a two-tiered structure as shown below. Products reach consumers after passing through two wholesale markets.



(1) Wholesale Market in Production Area

Most seafood products are sorted and loaded at wholesale markets in production areas adjacent to the landing port. Reasons for this practice are:

- There is a huge fluctuation in production volume since catches vary depending on the weather and fishing conditions
- A wide variety of fish species in different sizes are caught in one catch
- Although the catch volume per fishery is small, it can be added-up to enough quantity for distribution
- There are different intended end-usages for each fish according to the size and freshness

There were 312 wholesale markets in production areas in Japan in 2018. They play an important role in the Japanese seafood industry where wide varieties of fish are traded. They serve the functions of consolidating, sorting and settling payment. Small-scale wholesale markets in production areas have issues such as a small trading size and weakness of price formation.

Most wholesale markets in production areas are established and operated by fishery cooperatives, which have small trade volumes and poor pricing power. Therefore, in order to increase the income of fishers, it is crucial to merge markets, concentrate facilities and promote entry of new purchasers.

(2) Wholesale Market in Consumption Areas

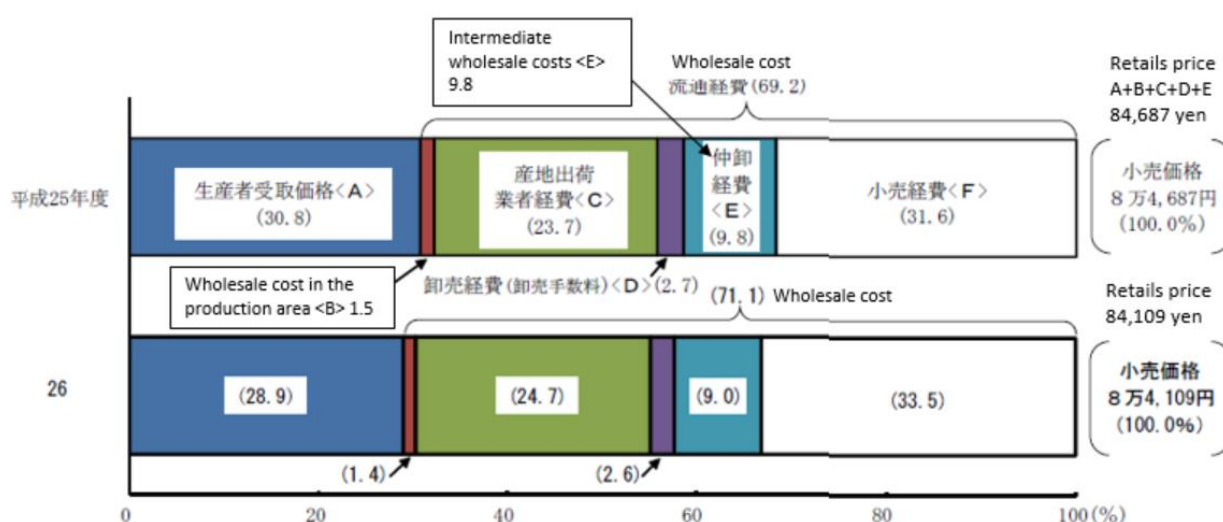
Seafood is shipped from wholesale markets in production areas to wholesale markets in consumption areas, which is the starting point for distribution. Reasons for this are:

- Wholesale markets in production areas can only distribute limited species of seafood caught in the area,
- By collecting seafood from each wholesale market in the production area, a wide range of seafood in sufficient quantity becomes available
- Sorting out by end use, and selling to retailers results in efficient distribution.

The volume of seafood distributed through the wholesale market in the consumption area is in decline due to an increasing direct business mainly for processed and/or frozen products to retailers as well as consumers through the internet. Distribution channels are expected to diversify further.

3.7 PRICING STRUCTURE

From a production area to a consumption area, freshness needs to be maintained by constant cold/freezing system. Much seafood is distributed in the form of fillet or sashimi, resulting in a higher distribution cost. Moreover, once defrosted, seafood needs to be sold quickly in order to avoid quality-loss by re-freezing it. This can also be a factor which increases cost.



3.8 TARIFF SCHEDULE

Tariff rates on seafood vary from 0 to 40% under Chapters 3, 12 and 16.

http://www.customs.go.jp/english/tariff/2019_2/index.htm

(See the rates under WTO for imports from the UK into Japan)

Chapter 3: Fish and crustaceans, molluscs and other aquatic invertebrates

Chapter 12: Oil seeds and oleaginous fruits; miscellaneous grains, seeds and fruit; industrial or medicinal plants; straw and fodder

Chapter 16: Preparations of meat, of fish or of crustaceans, molluscs or other aquatic invertebrates.

Japan has negotiated several trade agreements recently which effect the tariffs for certain countries importing into Japan.

The Japan/EU Economic Partnership Agreement (EPA) entered into force on 1 February 2019. For exports from the EU to Japan, tariffs are eliminated with immediate effect for flat fish, Atlantic salmon, frozen trout, etc. As for Tuna which accounts for approximately half of all exports from the EU to Japan, the yellow fin tuna, frozen bigeye tuna, frozen Atlantic bluefin tuna tariff is abolished with immediate effect. For Atlantic bluefin tuna, the tariff is eliminated over 11 years and fresh Atlantic bluefin tuna and frozen bluefin tuna fillets over 6 years. Seaweed and kelp are excluded from the list of tariff elimination/reduction.

In CPTPP, which came into force at the end of 2018, Japan has agreed on gradual reduction of customs tariff over 6 – 11 years for mackerel, sardine, scallop, cod, squid, tuna/billfish, salmon/trout and the immediate reduction of 15% customs tariff for seaweed/ processed seaweed. As for trout and salmon from Chile, the largest supplier among TPP11 countries, Japan agreed elimination of customs tariff from April 2017.

3.9 REGULATIONS

Food Sanitation Law

Just like other foodstuffs, seafood is subject to the Food Sanitation Law. Food additives and agricultural chemical residue in foods are often the main issues. An English translation of the latest version is not available, but the translation as of April 2009 still provides basic contents covered by law:

<http://www.japaneselawtranslation.go.jp/law/detail/?ft=2&re=01&dn=1&yo=%E9%A3%9F%E5%93%81%E8%A1%9B%E7%94%9F%E6%B3%95&ia=03&x=25&y=17&ky=&page=1>

Import Procedure under Food Sanitation Law

<http://www.mhlw.go.jp/english/topics/importedfoods/1.html>

Food additives

<http://www.mhlw.go.jp/english/topics/foodsafety/foodadditives/>

- 455 additives are categorised as Designated Additives (as of July 2018) and 365 as Existing Food Additives (as of January 2014).

Designated Additives:

<http://www.ffcr.or.jp/zaidan/FFCRHOME.nsf/pages/list-desin.add-x>

Existing Food Additives:

<http://www.ffcr.or.jp/zaidan/FFCRHOME.nsf/pages/list-exst.add>

(Until 1995, additives from a natural origin were not subject for designation. The law was revised in 1995 to make additives from a natural origin subject for designation. However, those which had been used before 1995 were exempted from the revision and continued to be used. These are called Existing Food Additives.)

Agricultural Chemical Residue in Foods

<http://www.mhlw.go.jp/english/topics/foodsafety/positivelist060228/introduction.html>
<http://www.ffcr.or.jp/zaidan/FFCRHOME.nsf/pages/MRLs-p>

- 799 substances are listed in the positive list as of February 2015.
A search function is available at: <http://db.ffcr.or.jp/front/>

- The maximum permissible amount of agricultural residue not included in the positive list is set at 0.01ppm.
- There are 65 substances which are not listed in the positive list but have been identified as “having no potential to cause damage to human health”. These 65 substances can be seen at:
<http://www.mhlw.go.jp/english/topics/foodsafety/positivelist060228/dl/n02.pdf>

Radioactive caesium

The Japanese government tightened the radioactivity level allowed in foodstuff as of 1 April 2012 for the purpose of food safety. The maximum level of annual dose from foodstuff is set at 1 millisievert including dose from those other than radioactive cesium, which is compliant with standards set by CODEX. In the case of seafood, it is 100 becquerels/kg (changed from 500 becquerels/kg).

Import quota

The list of seafood items subject to import quotas is published once a year by the Ministry of Economy and Trade Industry (METI).

http://www.meti.go.jp/policy/external_economy/trade_control/03_import/04_suisan/importquota.html#mokuji-6 (in Japanese only)

The following 19 seafood products are subject to an import quota:

Quota set by volume:

- Horse mackerel (Aji)
- Sardine (Iwashi)
- Mackerel (Saba)
- Pollack (Suketodrara)
- Cod (Tara)
- Cod roe (Tarako)
- Squid
- Sagittated calamary (Dried Surume)
- Atlantic Herring (Atlantic Nishin)
- Herring (excluding Atlantic Nishin)
- Seaweed (Kombu)
- Processed seaweed (Processed Kombu)
- Scallop (Hotate)
- Dried seaweed (Dried Nori)
- Seasoned dried seaweed (Dried seaweed seasoned, no sugar)
- Processed seaweed (Processed Nori)
- Dried green laver (Dried Aonori pieces and Hitoegusa (Monostroma nitidum))

Quota set by value:

- Seafood product origin of Korea (Cod, Yellowtail, Skipper, Scallop adductor, Dried sardine, Horse mackerel, Mackerel, Sardine and Scallop)
- Yellowtail (Buri)
- Skipper (Samma)
- Scallop and Dried scallop adductor

H.S. Code	Examples of products
0301.99-2	Live fish - Nishin (<i>Clupea</i> spp.), Tara (<i>Gadus</i> spp., <i>Theragra</i> spp. and <i>Merluccius</i> spp.), Buri (<i>Seriola</i> spp.), Saba (<i>Scomber</i> spp.), Iwashi (<i>Etrumeus</i> spp., <i>Sardinops</i> spp. and <i>Engraulis</i> spp.), Aji (<i>Trachurus</i> spp. and <i>Decapterus</i> spp.) and Samma (<i>Cololabis</i> spp.)
0302	Fresh or chilled fish – Same seafoods as 0301.99-2 plus Tara eggs
0303	Frozen fish - Same seafoods as 0301.99-2 plus Tara eggs
0304	Fillets of same seafoods as 0301.99-2 and other fish meat
0305	Dried, salted or in brine of same seafoods as 0301.99-2, fish meals of these seafoods, Tara eggs and dried sardines
0307	Scallops, adductors of shellfish and squid
1212.21-1	Edible seaweeds which are formed into rectangular (including square) papery sheets not larger than 430sq cm/sheet
1212.21-2	Edible seaweeds which are <i>Porphyra</i> spp. and other edible seaweeds mixed with <i>Porphyra</i> spp. (excluding those specified in 1212.21-1)
1212.21-3	Other edible seaweed
2106.90-2-(2)	Seaweed preparation

Details of import quota items can be checked on:

http://www.meti.go.jp/policy/external_economy/trade_control/03_import/04_suisan/download/201709IQichiran.pdf

Labelling

Labelling is governed by the Consumer Affairs Agency. While their website provides no full English guidance, the following information is required on labels of seafood products:

- 1) Name
- 2) Place of origin (place where the subject seafood was caught)
- 3) "Defrosted" if applicable
- 4) "Cultured" if applicable

In addition to the above, the following information is required for cut/split seafood eaten raw or frozen seafood other than cut/split seafood:

- 5) Allergens which include additives derived from shrimp, crab, flour, soba, egg, milk or peanuts
- 6) Storage method
- 7) Best before date

The above is basic guidance and details should be confirmed for each product.

3.10 TRADE SHOWS

There are three trade shows which are suitable for UK seafood companies to exhibit in Japan:

Japan International Seafood & Technology Expo

http://www.exhibitiontech.com/seafood/e_tokyo_index.html

- Annual – Every summer
- Scottish Development International has organised UK & Scottish co-participation over the past years including cooking demonstrations combined with tasting to attract interest from local buyers.

Foodex

<http://www3.jma.or.jp/foodex/en/>

- One of the largest international food & drink trade shows in Asia-Pacific
- Annual – Every March
- A webinar on Foodex was organised by UKTI Japan in September 2015 and the recorded version is available at www.exporttojapan.co.uk

Supermarket Trade Show

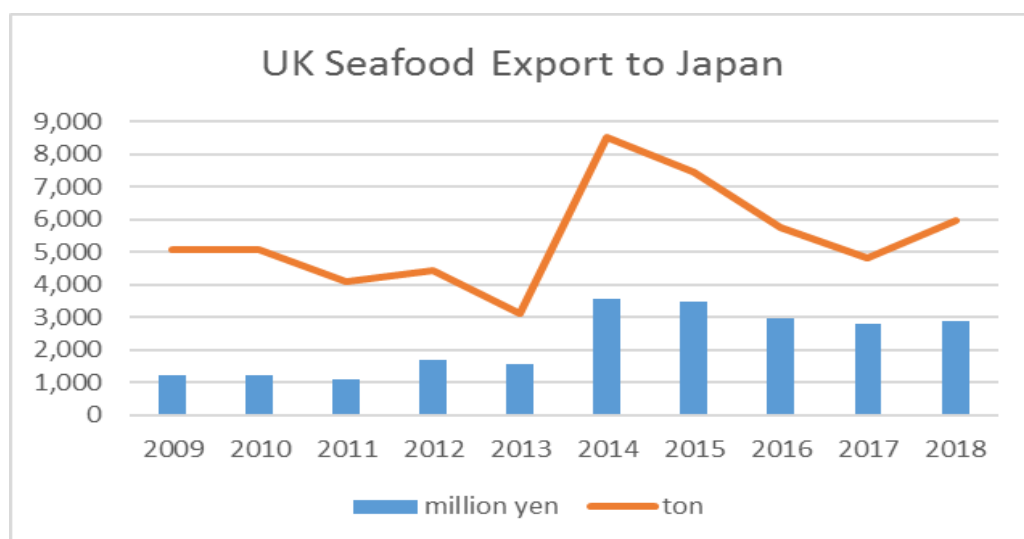
<http://www.smts.jp/en/>

- Annual – Every February
- Trade show focused on supermarket and retailers

4. UK SEAFOOD BUSINESS IN JAPAN

4.1 TOTAL UK SEAFOOD EXPORTS TO JAPAN

The following chart shows the trend of UK seafood exports to Japan over the last ten years from 2008 to 2018, both in volume and value, based on Japanese customs clearance statistics for products falling into the tariff rate categories of Chapters 3, 12 and 16.



	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
million yen	1,224	1,223	1,103	1,678	1,561	3,582	3,500	2,990	2,801	2,894
ton	5,091	5,088	4,110	4,460	3,104	8,531	7,462	5,759	4,843	5,952

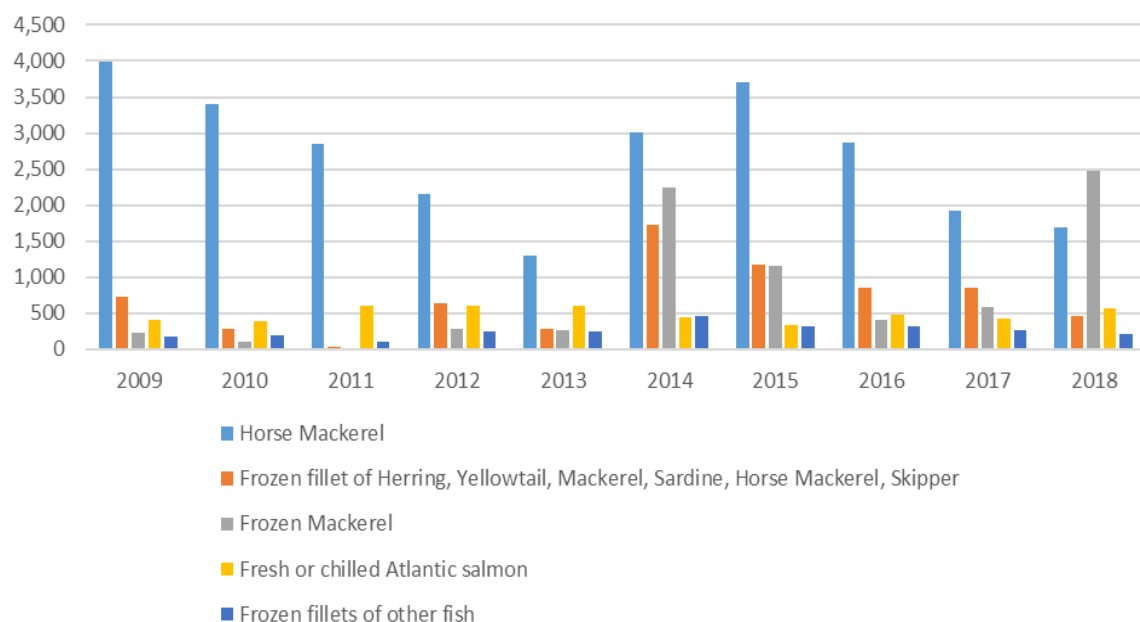
4.2 UK SEAFOOD VARIETIES IN HIGH DEMAND IN JAPAN

The following five kinds of seafood demonstrate the highest demand among all the seafood exported from the UK over the past ten years, and ranked within the top ten for most of the years.

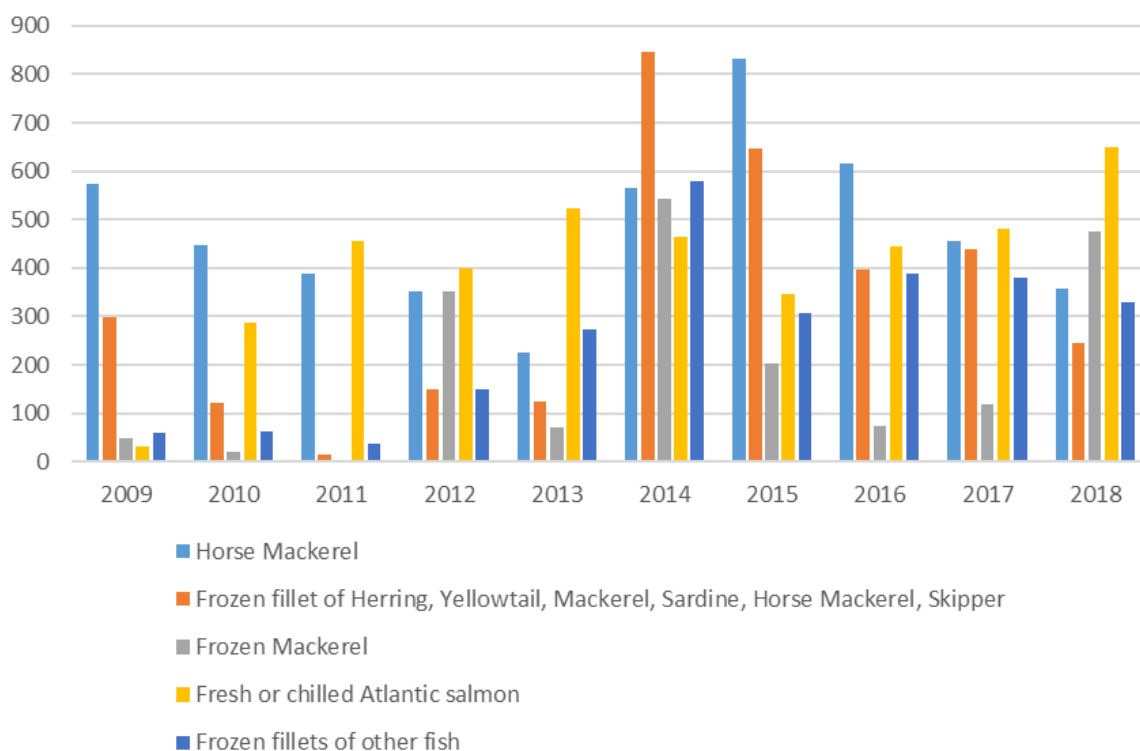
- Frozen Jack and horse mackerel
- Frozen Mackerel
- Fresh or chilled Atlantic salmon
- Frozen fillet (Herring, Yellowtail, Mackerel, Sardine, Horse Mackerel, Skipper)
- Frozen fillet of other fish

Mackerel accounts for around 40% of export volumes, followed by horse mackerel (28%), then Atlantic salmon (9%). However, in value terms, Atlantic salmon is the product with highest export value. In 2018, the product with highest export value was Atlantic salmon (649 million yen), followed by mackerel (476 million yen) and horse mackerel (356 million yen).

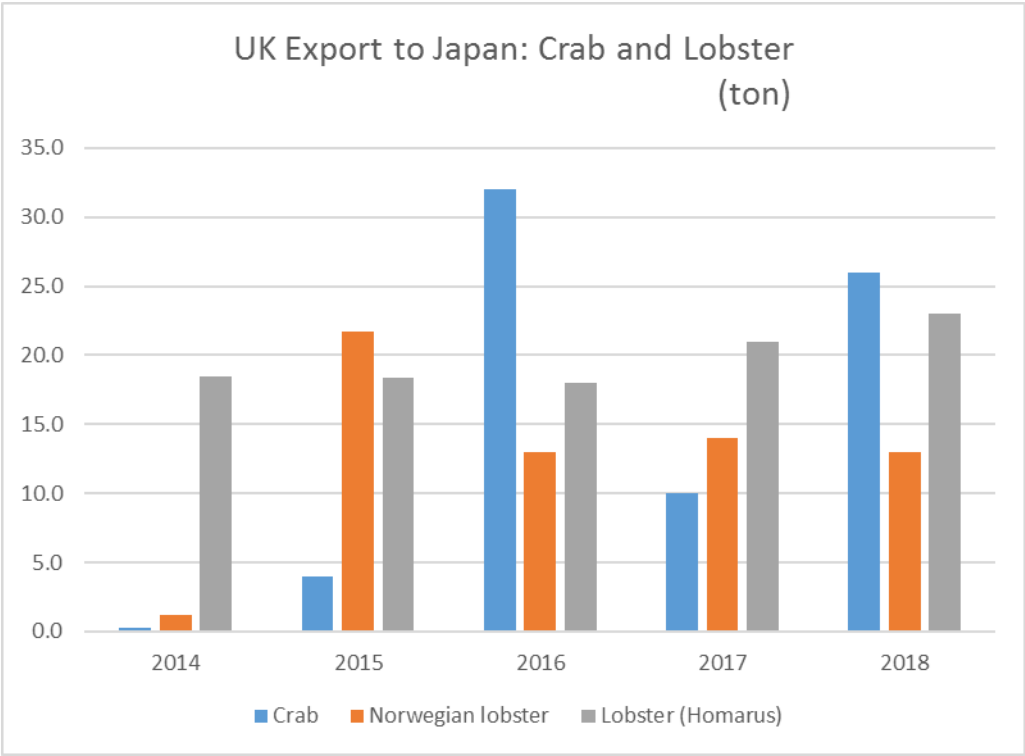
UK Seafood Export to Japan by Volume (ton)
2009 -2018



UK Seafood Export to Japan by Value (million yen)
2009 -2018



The volume of UK lobster and crab exports to Japan is modest, but it has grown rapidly over the past few years. In 2014, the export volume for crab and lobster was 20 tons, but by 2018 the volume had tripled to 62 tons. Value wise, crab and lobster was the 8th largest export to Japan in UK seafood exports to Japan in 2018 at 137 million yen.



UK Seafood Varieties Imported to Japan

Volume: ton, Value: million yen

H.S. Code	Species	2009		2010		2011		2012		2013		2014		2015		2016		2017		2018	
		Volume	Value	Volume	Value	Volume	Value	Volume	Value	Volume	Value	Volume	Value	Volume	Value	Volume	Value	Volume	Value	Volume	Value
0303.55-000	Frozen Aji (Jack and horse mackerel - Trachurus spp.)	3,989	575	3,398	448	2,855	388	2,160	351	1,298	225	3,011	565	3,703	833	2,859	615	1,926	455	1,688	356
0304.89-100	Frozen fillets of other fish - Nishin (Clupea spp.), Buri (Seriola spp.), Saba (Scomber spp.), Iwashi (Etrumeus spp., Sardinops spp. and Engraulis spp.), Aji (Trachurus spp. and Decapterus spp.) and Samma (Cololabis spp.)	718	298	283	120	28	15	627	150	285	124	1,726	846	1,178	646	847	396	844	439	465	246
0303.54-000	Frozen Mackerel (Scomber scombrus, Scomber australasicus, Scomber japonicus)	231	48	98	20	n/a	n/a	272	351	254	72	2,248	542	1,160	204	397	74	578	118	2,468	476
0302.14-000	Fresh or chilled Atlantic salmon (Salmo salar) and Danube salmon (Hucho hucho)	411	31	379	286	602	455	606	399	600	524	430	464	331	3,386	467	445	413	481	559	649
0304.99-999	Frozen fillets of other fish	171	60	188	63	106	36	234	150	240	273	458	580	305	307	306	388	264	381	207	328

5. JAPANESE IMPORTERS & RETAILERS

5.1 SEAFOOD IMPORTERS

Below is list of leading importers of seafood including high end products.

Hanwa Co Ltd

Address: 1-13-1, Tsukiji, Chuo-ku, Tokyo 104-8429
Web: <https://www.hanwa.co.jp/business/food/> (in Japanese only)
Profile: Importer, distributor and processor of seafood. Imports processed seafood from China, Vietnam and Thailand. Set up office in Holland and Chile to import seafood. Handles salmon, shrimp, octopus, mackerel, horse mackerel, herring, crab, poultry, etc.

Hasebe Co Ltd

Address: 1-20-7 Shiomi, Koto-ku, Tokyo 135-0052
Web: <http://www.mp-hasebe.co.jp/> (Japanese language only)
Profile: Importer, processor and distributor of seafood. Currently import fresh salmon and live lobster (Homard Blue) from Scotland.

H&I Co Ltd

Address: 3-10-19 Ginza, Chuo-ku, Tokyo 104-0061
Web: <http://www.hi-ginza.com/english/>
Profile: Importer and distributor of British food and drink products including smoked salmon from Scotland.

Honda Seafoods Co Ltd

Address: 7-13-5-7F Tsukiji, Chuo-ku, Tokyo 104-0045
Web: n/a
Profile: Importer and distributor of seafood including smoked salmon/scallops/lobster from the UK.

Island Foods Co Ltd

Address: 3-1-2-2F Shirogane, Minato-ku, Tokyo 108-0072
Web: <http://www.islandfoods.jp/> (Japanese only)
Profile: Importer, wholesaler and distributor of foods (mainly from Italy) including European langoustine and Sprat from Scotland.

Kyokuyo Co Ltd

Address: 3-3-5, Akasaka, Minato-ku, Tokyo 107-0052
Web: <https://www.kyokuyo.co.jp/en/>
Profile: Wholesaler, importer and processor of seafood.

Marine Foods Co Ltd

Address: 2-1-1, Osaki, Shinagawa-ku, Tokyo 141-6011
Web: <https://www.marinefoods.co.jp/english/>
Profile: Wholesaler, importer and processor of seafood.

Maple Foods Ltd

Address: 6-14-8-1F Tsukiji, Chuo-ku, Tokyo 104-0045
Web: <http://www.maplefoods.co.jp/> (in Japanese only)
Profile: Manufacturer, importer, wholesaler and retailer of seafood (mainly), tropical fruits and vegetables, etc. Used to import Scottish smoked salmon.

Mitsubishi Corporation

Address: 2-3-1 Marunouchi, Chiyoda-ku, Tokyo 100-8086
Web: <http://www.mitsubishicorp.com/jp/en/>
Profile: One of the largest general trading houses in Japan. Currently import pink shrimps from the UK through Mitsubishi Corporation in the UK.

Mitsui & Co Ltd

Address: 1-3-1 Marunouchi, Chiyoda-ku, Tokyo 100-8631
Web: <https://www.mitsui.com/jp/en/index.html>
Profile: One of the largest general trading houses in Japan. Used to represent a UK salmon company.

Nichimo Co Ltd

Address: 2-2-20, Higashi-shinagawa, Shinagawa-ku, Tokyo 140-0002
Web: <https://www.nichimo.co.jp/english/>
Profile: Wholesaler, importer and processor of seafood. Handles fish paste, crab, Pollack egg, frozen fish.

Nichirei Fresh

Address: 6-19-20, Tsukiji, Chuo-ku, Tokyo 104-0045
Web: <https://www.nichireifresh.co.jp/en/recipe/>
<https://www.nichireifresh.co.jp/product/fish/>
Profile: Wholesaler, importer and processor of seafood.

Nissui Co Ltd

Address: 1-3-1, Nishi Shimbashi, Minato-ku, Tokyo 105-8676
Web: <http://www.nissui.co.jp/english/index.html>
Profile: Wholesaler, importer and processor of seafood. Have global operation network including North America, New Zealand and aquafarming in South America.

Ras Super Fries Co Ltd

Address: 260-35 Hase Aza Yanagimachi, Atugi City, Kanagawa Pref 243-0036
Web: <http://rassuper.com/> (in Japanese only)
Profile: Importer and distributor of seafood, frozen vegetables and other food products. Used to import Shetland salmon but stopped due to low sales.

Saihoku Fisheries Corporation

Address: 2-11-10 Tsukiji, Chuo-ku, Tokyo 104-0045
Web: http://www.saihoku-f.co.jp/index_en.html
Profile: Wholesaler, importer, exporter and processor of seafood. Currently import smoked salmon from the UK.

Shigematsu & Co Ltd

Address: 1-20-9-8F Sugamo, Toshima-ku, Tokyo 170-0002

Web: <http://www.shigematsu.jp/> (in Japanese only)

Profile: Importer and distributor of food and drink products and chemicals, including current import of oil sardine from the UK

Toho Bussan Kaisha Ltd

Address: 2-4-1, Shiba Koen, Minato-ku, Tokyo 105-8584

Web: <https://www.tohob.co.jp/company/english.php>

Profile: Importer and distributor of seafood, soybean, rice, etc. Subsidiary of Mitsui & Co.

Toyo Reizo Co Ltd

Address: 2-37-38-2F Eitai, Koto-ku, Tokyo 135-0034

Web: <http://www.toyoreizo.com/> (in Japanese only)

Profile: Wholesaler, importer and processor of marine, agricultural, livestock and dairy products and chemicals, including current import of salmon from Scotland. Subsidiary of Mitsubishi Corporation.

Tsujino Co Ltd

Address: 2-6528-36, Kawatuchi-cho, Choshi-shi, Chiba 288-0001

Web: <http://www.tsujino.co.jp/en/>

Profile: Wholesaler, importer and processor of seafood.

Wine Shop Nishimura

Address: 8-9-23 Honmachi, Sumoto City, Hyogo Pref 656-0025

Web: <http://ws2460.com/> (in Japanese only)

Profile: Importer and distributor of food and drink products mostly from the UK, including current import of smoked salmon, smoked haddock and cooked mussel from Scotland.

5.2 MAJOR GENERAL FOOD & DRINK RETAILERS

The following list is based on Japanese retailers' annual sales ranking for the fiscal year 2016/17, which covers not only food retailers but all industries. We have listed below the top five companies which are generally recognised as major players in the food retail business. Their ranking order may change depending on their accurate figures for food sales.

These retailers operate GMS (General Merchandise Stores) where most consumers go to purchase daily food products including seafood.

No.1 AEON Co Ltd

Sales: 8,390 billion yen

Address: 1-5-1 Nakase, Mihama-ku, Chiba City, Chiba Pref 261-8515

Web: <http://www.aeon.info/en/>

Profile: Holding company of over 300 companies and businesses in the retail, shopping mall development, finance, services and related industries with 21,742 retail outlets nationwide.

Well-known retail store names include:

- GMS (General Merchandise Stores) – Aeon
- Supermarkets/Discount stores – Max Value, Daiei, Kohyo and Maruetsu
- Convenience stores – MINI STOP

No.2 Seven & i Holdings Co Ltd

Sales: 1,148 billion yen

Address: 8-8 Nibancho, Chiyoda-ku, Tokyo 102-8452

Web: <http://www.7andi.com/en/index.html>

Profile: Holding company of businesses in the retail (mainly), food service, financial service and IT services, etc with 21,850 outlets nationwide. Well-known store names include:

- GMS – Ito Yokado
- Supermarkets – York Benimaru, Tenmaya
- Convenience stores – Seven Eleven
- Speciality stores (non-food) – BARNEYS, LOFT, Akachan Honpo, Tower Records, Oshman's, Franc Franc

No.3 IZUMI Co Ltd

Sales: 19.6 billion yen

Address: 3-3-1 Futabanosato, Higashi-ku, Hiroshima City, Hiroshima Pref 732-0057

Web: http://www.izumi.co.jp/corp/e_ir/

Profile: Operator of shopping centres (Youme Town), GMS and supermarkets (IZUMI) (110 outlets in Western Japan).

No.4 LIFE Corporation

Sales: 10 billion yen

Address: (Osaka HQ) 2-2-22 Nishi-Miyahara, Yodogawa-ku, Osaka 532-0004
(Tokyo HQ) 1-2-16 Taito, Taito-ku, Tokyo 110-0016

Web: <http://www.lifecorp.jp/> (in Japanese only)

Profile: Operator of supermarket chain (mainly food) with 275 outlets in the Tokyo and Osaka areas (as of February 2019)

No.5**Lawson Inc**

Sales: 2,283.6 billion yen

Address: 1-11-2 Osaki, Shinagawa-ku, Tokyo 141-8643

Web: <http://lawson.jp/en/>

Profile: Operator of convenience stores (LAWSON), upper-market import-focused food stores (Seijo Ishii), HMV online, United cinemas, etc, with 13,002 outlets across Japan (as of February 2019)



6. FOLLOW-UP ACTION

We would be interested in receiving your feedback on this report and happy to discuss further research on more focused areas through another OMIS if needed.

As a valued client of Department for International Trade Japan, we would like to inform you about an excellent online resource which we are proud to be partnered with – Export to Japan www.exporttojapan.co.uk

Export to Japan is a not-for-profit partnership between Department for International Trade Japan, British Airways, the British Chamber of Commerce in Japan and Business Link Japan. It aims to give your company access to the best support, information and services so you can succeed in the Japanese market. Keep up to date with the [latest news](#), [free in-depth market reports](#), [events](#) including [live webinars](#) and informative [videos](#) all hosted on the site.

[Membership is completely free](#), enabling you to take advantage of a range of exclusive offers with Japan-based businesses providing you with an instant accredited network of business support in the market. Partners include airlines, hotels, translators, PR/Marketing, accountancy, business consultancy and many others.

To see the full range of discounted offers available to you please go to:
www.exporttojapan.co.uk/partners/business-offers

[Join the site today](#) to keep ahead of the game in doing business in Japan. We look forward to seeing you there and helping your business grow in the world's 3rd largest market.

Department for International Trade offers many services that may be of assistance to you in this market. Information is available at www.gov.uk/dit, including general information on doing business in Japan and on services such as Export Market Research and Languages in the Export Advisory Scheme.

We look forward to hearing from you soon and continuing to work with you to help expand your business in Japan.

Performance & Impact Monitoring Survey (PIMS)

The Department for International Trade (DIT) is striving to provide the highest quality service to all its clients, and greatly values feed back from the businesses it has helped. In order to achieve this, DIT has commissioned an independent market research specialist, OMB Research, to conduct surveys on its behalf. The interviews invite clients to provide frank views on both the quality and usefulness of the support provided. These surveys are conducted under the market research code of conduct, which means that all of the survey responses are strictly confidential, and reported to DIT only in anonymised aggregate form.

DIT uses the findings from these surveys to help drive quality improvement and to inform the focus of its trade services, to ensure they are meeting the needs of UK exporters as effectively as possible.

As Seafish Industry Authority has been a recipient of DIT's Overseas Market Introduction Service, you may be contacted by OMB research and asked to take part in the survey. Participation in the surveys is voluntary, but as this evidence is important to informing DIT policy development, so we very much hope you will be able to take part.



Department for International Trade

DISCLAIMER

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Department for International Trade

The Department for International Trade (DIT) is responsible for promoting British trade across the world and ensuring the UK takes advantage of the huge opportunities open to us.

We are responsible for:

- developing, coordinating and delivering a new trade and investment policy to promote UK business across the globe
- developing and negotiating free trade agreements and market access deals with non-EU countries
- negotiating plurilateral trade deals (focused on specific sectors or products)
- providing operational support for exports and facilitating inward and outward investment