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Prepared by:

Casey E. Bean

U.S. Embassy

Drafted by:

Kakuyu Obara/Tom Asakawa

Report Highlights:

During 1999 Japan's imports of U.S. and Norwegian salmon are forecast to rise, offsetting a drop in Japan's domestic catch. The recovery in the U.S. summer salmon catch fueled import growth this year, with salmon imports from the United States projected at 55,000 MT, up 38 percent from last year. For U.S. salmon, competition in 2000 will be intense with farm raised salmon suppliers such as Norway and Chile who are forecast to boost exports to Japan. For surimi, market demand in 1999 has reportedly shifted towards lower-priced products due to Japan's weak economy. This market trend may likely affect demand for high grade U.S. pollock and PW surimi. Nonetheless, Japan's annual surimi imports from U.S. in 1999 are projected to be modestly above last year at 115,000 MT in part due to softened EU demand for U.S. fillets.

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Executive Summary

Japan's total salmon utilization (demand) in 1999 is forecast at 454,000 MT, marginally below the previous year. The forecast for the year's domestic catch is down 7 percent from last year at 225,000 MT. Similar to 1998 situation, this year's anticipated reduction of domestic catch is expected to offset increased imports which are forecast to rise 9 percent to 245,000 MT. The yen's appreciation against other major currencies is also generating additional import demand for both wild and farm raised salmon and trout in 1999.

Japan's imports of U.S. wild natural salmon are forecast to rise in 1999. The recovery in the U.S. summer salmon catch will contribute to import growth this year, with total imports from the United States projected at 55,000 MT, up 38 percent from last year. The wild salmon catch in North America (Alaska) this summer was reportedly the second largest in history.

Despite the large catch, industry sources say that large variations in the quality and size of U.S. wild salmon, coupled with reportedly slowing individual consumption in Japan, could affect this year's Japanese purchases of U.S. wild salmon.

Further, Japan's imports of farm raised salmon and trout from Norway are forecast to rise significantly in 1999 compared with last year, projected at 65,000 MT, because of reduced supplies of salmon and trout from Chile. Other factors driving the import growth of Norwegian salmon this year are related to chronic surplus production in Norway and the EU's import quota for Norwegian salmon and trout resulting in the diversion of more salmon to Japan and other Asian countries this year. A weaker euro currency against the Japanese yen has also helped to boost imports from Norway this year.

Chilean farm raised salmon and trout supplies in Japan are expected to dwindle because of disease problems and delayed growth of fish reported during the first half of 1999. Total imports from Chile are forecast to drop and reach about the same level as that of Norway in 1999. Major Japanese retail and HRI/HMR end user clients reportedly shifted to Norwegian supplies to cover the supply short-fall this year.

Given Japan's continued weak market for fish cake and fish paste products, Japan's industry demand for raw material surimi in 1999 is anticipated to slide further this year to 385,000 MT, a 5 percent decline from a year before. Meanwhile, due to slumping individual consumption and the weak economy in Japan, the market demand for final surimi products this year has reportedly shifted toward conventional value items such as "agemono" (fried) and "chikuwa" (tube shaped fish paste), rather than traditional high quality, high value gifts and festive items such as "kamaboko" and "hoso kamaboko" (steamed fish paste and in casing).

The above market trend may affect this year's demand for U.S. pollock and PW surimi of high grade as the Japanese industry focuses on lower grade surimi. Surimi suppliers from South East Asia, China, and South America, whose products are used as raw materials for conventional value products mentioned above, will benefit from good export growth this year to Japan. Itoyori and Croaker from Thailand are examples of products popular for making such lower-valued product items.

Nonetheless, Japan's annual surimi imports from U.S. in 1999 are projected to be modestly above last year at around

115,000 MT. Industry sources project that annual U.S. surimi production will likely remain at last year's level. The industry expects this year's EU demand for fillets to be not as strong as the previous year. Reportedly rising prices of fillets and other cuts of white meat fish, affected by the weakened euro against the dollar this year, is a factor causing softened demand in the EU for U.S. pollock and PW fillets.

Post's 2000 forecasts in the PS&D table (supply and distribution) reflect an average of the past several year's for salmon and surimi.

For salmon, the U.S. industry forecast wild sockeye return in Bristol Bay in 2000 is "a total of 35.4 million sockeye are expected to return to Bristol Bay in 2000. This prediction is 17 percent lower than the previous 10-year mean and 12 percent lower than the previous 20-year mean returns." Although both Japan and Alaskan salmon harvests in 2000 are uncertain, post expects the basic consumption trend described for 1999 will likely persist.

For U.S. salmon, competition in 2000 will be intense with farm raised salmon suppliers such as Norway and Chile who provide stable supplies throughout the year. Industry sources in Norway predict a 10 percent rise in salmon sales to Japan for 2000, in part boosted by increased public relation expenditures. Wild salmon in general has an appeal to healthy and natural conscious Japanese consumers—precisely the themes being promoted by the Alaska Seafood Marketing Institute Tokyo office. Quality and value are increasingly important criteria for Japanese salmon buyers.

For surimi, tight individual and household spending will continue to affect high grade surimi products sales in Japan, which in turn will likely affect for the demand for high grade U.S. pollock surimi in 2000. Consumers' thrifty trend will likely favor conventional and inexpensive surimi products.

Japanese Salmon Market Situation and Outlook Summary in 1998 - 1999

Demand and Supply Situation and Outlook 1999

Japan's total salmon utilization (demand) in 1999 is forecast to be marginally below the previous year estimated at 454,000 MT. This year's total domestic catch is forecast down 7 percent at 225,000 MT. The Fall season catch this year off the coast of Hokkaido, Japan's major area of returned salmon, was reportedly down 13 percent as of late October.

Similar to the 1998 situation, this year's anticipated fall in domestic catch will be offset by increased imports, which are forecast to rise 9 percent to 245,000 MT. The yen appreciation against other major currencies is also generating additional import demand for both wild and farm raised salmon and trout in 1999. As detailed in the "Trade Situation and Outlook Section", due to the recovery of the summer season catch in North America (Alaska) this year, Japan's imports in 1999 of U.S. wild salmon are forecast to rise. The supply of farm-raised salmon and trout supply from Norway this year is also forecast to rise significantly this year compared to last year due to reduced supplies of salmon and trout from Chile. The year-ending frozen stock is estimated at the same level as the year before.

Japanese household consumption during the first half of 1999 of "nama-sake" declined 1 percent and of "shio-sake" fell 4 percent compared to the same period of the previous year (see table below). Industry sources are optimistic about household salmon consumption in the latter half of this year as retailers are gearing up for sales during the fall and winter

for chilled/fresh frozen and brined fillets.

Quantities and Expenditures of Salmon Purchased per Household

Period: January - June 1999

	Quantities (grams)	% Chg.	Expenditures (yens)	% Chg.
Chilled Salmon	1,349	-1%	2,049	-4%
Salted Salmon	805	-6%	1,209	-4%

Source: Management and Coordination Agency

Though no estimates are available, HRI/HMR sector utilization of salmon and trout in 1999 appears to have slowed as evidenced by rising levels of monthly frozen stocks. The October 1999 frozen stock was 25 percent higher than the previous year. Coupled with reduced per capita spending on eating-out and higher market prices for salmon and trout this year, the long, hot summer may have affected HRI/HMR utilization of salmon and trout.

Salmon and trout are increasingly featured in HRI/HMR menus. Fresh frozen salmon is a popular topping of sushi and seafood bowl dishes in sushi bars and Japanese style restaurants. Also, brined salmon/trout is extensively used as a side dish item in convenience and take-out lunch box menus. Piece cuts of salmon and trout fillet are also popular items in HMR preparation for broiled and grilled dishes. In Japan's retail and HRI/HMR sector, one trend is appealing to the natural and healthy aspects of fish by featuring in fairs banners such as "fresh from the wholesale market" and "fresh from the sea".

The continuing rise in the market price is one factor which could affect Japan's salmon consumption this year. Due to decreased arrivals, the wholesale market prices in 10 central wholesale markets in major cities in Japan during the first half of 1999 have continued to rise, averaging for fresh/frozen salmon at 738 yen per kilo, up 20 percent, and for salted/brined salmon at 922 yen per kilo, up 24 percent compared to the same period of the previous year. In the same period, arrivals of fresh/frozen salmon and salted/brined salmon were down 6 percent and 16 percent compared to the same period of the previous year.

Trade Situation and Outlook 1999

Japan's annual salmon imports in 1999 are forecast to rise about 9 percent compared to the previous year to reach around 245,000 MT. The recovery of the summer season catch in the United States is expected to contribute to import growth this year with U.S. imports projected at 55,000 MT, up 38 percent from last year. Wild salmon catches in North America (Alaska) this summer were reportedly the second largest in history.

However, industry sources say that large variations exist in quality and size. This factor, coupled with slowing individual consumption in Japan, may affect purchases from the United States. During January - August 1999, imports from the United States were up 8 percent compared to the same period of the previous year at over 33,000 MT.

The Alaska Seafood Marketing Institute (ASMI) continues to actively promote Alaskan seafood, the largest seafood-supplying state. ASMI has been aggressively promoting Alaskan salmon in both the retail sector (including regional chains) and the HRI sector, employing the words "wild", "natural" and "organic" in its public relation activities. ASMI

plans to cater its promotions towards the various needs of the market this year, especially aimed at communicating the "distinguished identity" of Alaskan salmon with Japanese clients.

Japanese imports of Norwegian farm raised salmon this year, particularly frozen Atlantic salmon and trout, are expected to grow with the total volume to rise 76 percent from a year ago to 65,000 MT, in part due to reduced availability of Chilean product. The reasons for the growth of Norwegian salmon this year are attributable to chronic surplus production in Norway and the EU's import quota for Norwegian salmon and trout, resulting in the diversion of more salmon to Japan and other Asian countries. The weaker euro against the Japanese yen has also helped to boost imports from Norway this year. With this background, Norway has been sponsoring aggressive promotion campaigns for its farm raised salmon, emphasizing quality, at the same time, visually portraying the "beauty of the nature and clean sea water" through various media including TV and weekly magazines advertising. Norway is also tying up with the Japanese HRI/HMR and retail sectors for promotion campaigns.

Norway had one of the largest booths among seafood suppliers to Japan in the Japan International Sea Food Show held in July this year. ASMI and American Seafood Institute also participated in the event in promoting various American seafood. News about the good summer season salmon catch in Bristol Bay this year was well received and seems to have provided some relief to the Japanese trade.

Chilean farm raised salmon supplies, on the other hand, particularly trout, were substantially reduced during the January - August 1999 period because of reported disease problems and delayed growth of fish. Major Japanese retail and HRI/HMR end user clients reportedly shifted to Norwegian supplies to cover the supply short fall this year. The year total of Chilean salmon and trout, therefore, is projected to fall 30 percent over the period with the volume is to reach about the same level as Norway.

As for Russian supplies, imports are forecast to stay roughly the same as last year, contributing to the offset of reduced domestic Japanese catch during the fall season.

Japanese Salmon Imports by Country

Period: Jan. - August 1998 - 1999

Unit: Metric Tons (Customs Clearance Basis)

Country of Origin	1998 (Jan. - Aug.)	1999 (Jan. - Aug.)	% chg.
US	30,792	33,161	8%
Chile	78,899	59,212	-25%
Canada	3,462	4,567	32%
Norway	20,185	44,555	121%
Russian Fed.	11,189	13,249	18%
Other	3,078	6,659	116%
TOTAL IMPORTS	147,605	161,404	9%

Source: World Trade Atlas (Compiled by FAS/Japan)

Updates and Situation Summary 1998

Based on the latest MAFF fishery statistics, Japan's total salmon utilization (demand) in 1998 is estimated at around 456,000 MT, down 5 percent from the previous year. (Note that Japan's total salmon distribution figure for 1998 is still preliminary.) During 1998, unexpectedly poor domestic catch, particularly of returned salmon off the coast of Hokkaido during the fall season, was partially offset by increased imports, mainly from Chile and Russia, resulting in a slightly lower level of the year ending stock compared to the year beginning.

Accordingly, post revised the 1998 PS&D table figures. Changes in the total catch and imports from the previous forecasts are incorporated and should be used when referring to the 1999 situation. Import figures by country for 1998 in the trade matrix are also revised from World Trade Atlas data (the "NIMEXE" trade data system is no longer available to FAS/Japan). MAFF's preliminary total salmon catch estimate for 1998 was 242,000 MT, a level far below post's earlier catch estimate of 325,000 MT.

In lieu of the above supply shortfall, Japan's total salmon imports for 1998 were adjusted upward from post's previous forecast to 224,000 MT, up 7 percent from "1997 actual". As mentioned previously, imports of Chilean farm raised coho and trout increased substantially in 1998, holding the top share among all salmon suppliers to Japan at 42 percent.

Contrary to the Japanese poor catch situation during the fall, imports from Russia shot up 90 percent in 1998 at 41,000 MT due to a big catch off the coast during the fall season of returned salmon/trout. Russian salmon was mostly utilized as an alternative to domestic salmon for frozen fresh and brined fillets and other processed products.

Further, despite the poor catch of particularly sockeye in North America during the 1998 summer season, the final U.S. import figure turned out to be higher than post's earlier estimate and reached 40,000 MT, down 19 percent from the previous year's actual. Japanese buyers increased imports of other U.S. salmon species instead of sockeye in 1998. However, this 1998 U.S. final figure was still the lowest record in recent history with the share of Japan's total salmon imports slipping to only 18 percent, down five points from the previous year.

The reduced total salmon utilization estimate in 1998 also seems to reflect Japan's reduced household consumption of salmon (see table below). The household consumption of fresh/chilled salmon in 1998 was moderately below the level from a year before, down 2 percent, while that of the shio-sake (salted/brined salmon) continued to slide, down 6 percent as the consumption trend continues to favor less salty foods.

Quantities and Expenditures of Salmon Purchased per Household

Period: January - December 1998

	Quantities (grams)	% Chg.	Expenditures (yens)	% Chg.
Chilled Salmon	3,005	-2%	4,343	-2%
Salted Salmon	2,057	-6%	3,017	-7%

Source: Management and Coordination Agency

Although no estimates are available, HRI/HMR sector utilization of frozen and brined salmon in 1998 had also been affected by reduced supplies of wild natural salmon, particularly of domestic chum and sockeye from the United States, with some end users simply removing salmon from the menu or switching to alternative species such as Chilean coho and trout.

In the wholesale market place, due to largely reduced domestic salmon arrivals during the fall of 1998, price hikes were significant during the second half of 1998 for frozen fresh salmon at 743 yen per kilo, up 14 percent, and for salted or brined salmon at 743 yen per kilo, up 14 percent, with each arrival reduced 9 percent and 13 percent compared to the year before.

Japanese Surimi Market Situation and Outlook 1998 - 1999

Demand and Supply Situation and Outlook 1999

The Japanese market for fish cakes and fish paste products continues to remain lethargic in the first half of 1999. A longer than usual hot summer this year seems to have reduced fall season demand for final surimi products. Japanese fish cake and paste manufactures are reportedly struggling to develop new, more inexpensive products for consumers for regular consumption. Meanwhile, affected by slumping individual consumption and the weak Japanese economy, the market demand for final surimi products this year has shifted toward conventional value items such as "agemono" (fried) and "chikuwa" (tube shaped fish paste) rather than the traditional, high quality, expensive gift and festive items such as "kamaboko" and "hoso kamaboko" (steamed fish paste and in casing). In the market place individual piece sales of conventional surimi items are reported doing well this year.

Thus, industry sources predict that Japan's total fish cake and fish paste product production in 1999 will continue to fall modestly compared to the previous year. Given the above, Japan's industry demand for raw material surimi is anticipated to slide further this year and decline 5 percent from last year to around 385,000 MT.

The above market trend may likely affect this year's demand for U.S. pollock and PW surimi as the Japanese industry has reportedly been focusing on lower rather than higher grade surimi. Surimi suppliers in South East Asia, China, and South America, whose products are used as raw materials for conventional value products mentioned above, are expected to benefit from good export growth this year. Itoyori and Croaker from Thailand are examples said to be popular for making lower-value product items.

Based on the best industry information, Japan's annual raw material surimi forecast for domestic surimi production is down 5 percent at 130,000 MT, largely due to reduced domestic catches of raw material fish utilized for surimi (other than cod and pollock) such as "hokke" (Atka Mackerel). Additionally, imports will be roughly unchanged at 260,000 MT. The year ending stock was forecast slightly lower compared to the year beginning.

Trade Situation and Outlook 1999

As shown in the table below, during January - August 1999, Japan's surimi imports increased modestly, up 4 percent compared to the same period last year, to 157,000 MT, due to reduced domestic surimi supply. As for imports of U.S. surimi during the same period, the volume was about the same level as the previous year as A-season production

of pollock surimi was about the same level as the previous year. According to the most recent industry source projection, U.S. pollock and PW combined surimi production in B-season is forecast to total modestly above the previous year.

Given the above, post projects Japan's annual U.S. surimi imports in 1999 will be modestly above last year at 115,000 MT. Industry sources predict this year's EU demand for fillets may not be as strong as the previous year. Reportedly rising prices of fillets and other cuts of white meat fish, which are partly affected by the weakened euro against the dollar this year, is a factor attributable to the softened demand in EU for U.S. pollock and PW fillets.

The soft demand for high grade surimi has so far reportedly put downward pressure on U.S. pollock and PW surimi prices. Monthly (wholesale) average prices of frozen surimi for the offshore processed SA grade (U.S. Alaskan pollock frozen surimi) has been on the decline and traded at around 450 yen kilo in September, after reaching to 470 yen per kilo during the first half of 1999. Similarly, the price for FA grade has declined to 400 yen per kilo in September after reaching 450 yen per kilo during the first half this year. Reflecting the demand shift for lower grade item, the monthly prices of onshore grade second grade surimi (Hokkaido pollock surimi) held steady at 240 yen per kilo level so far this year.

During January - August this year, imports of surimi from Thailand were up 17 percent over the same period of the previous year, reportedly helped by the devalued Baht and solid market prices of surimi prevailing for processors during the period. However, an industry source predicts this growth pace of Thailand surimi will slow toward the year end due to low catches of raw material fish like Itoyori and croaker in the second half of 1999. Thus, FAS/Japan projects an annual total for Thai surimi at 72,000 MT.

Surimi supplies from Argentina, another major supplier of surimi from other fish species other than pollock and PW from North America, are projected to decline modestly this year compared to the previous year at 20,000 MT due to the large reduction in the quota for "minami-dara" (Southern Blue Whiting). The quota was 43,000 MT in 1999, 79,000 MT in 1998 and 85,000 MT in 1997. In lieu of reduced overall surimi production in Japan, it is anticipated that hoki surimi from Argentine will likely increase this year. Surimi vessels operating in Argentine ocean reportedly reached the quota volume on southern blue whiting by mid- September and have shifted to catching hoki. However, increased hoki surimi from Argentine will not likely be enough to offset declines of its "minami-dara" surimi this year.

Japanese Surimi Imports by Country

Period: Jan. - Aug. 1998 - 1999

Unit: Metric Tons (Customs Clearance Basis)

Country of Origin	1998 (Jan. - Aug.)	1999 (Jan. - Aug.)	% Chg.
US	58,698	58,015	-1%
Russia	8,229	8,864	8%
Chile	8,890	4,405	-50%
Argentina	12,986	13,953	17%
Thailand	41,557	43,862	17%
China	7,234	8,457	17%
Hong Kong	1,535	21	-99%
R. Korea	4,528	2,925	-31%
Others	7,894	11,449	45%
TOTAL IMPORTS	151,282	156,711	4%

Source: World Atlas (Compiled by Ag. Office Tokyo)

Update and Situation Summary 1998

Similar to the salmon section, based on the latest MAFF fishery statistics and World Trade Atlas data for 1998, Japanese surimi PS&D table and the trade matrix were revised and adjusted to the current. Major adjustments were made in several places; i.e., the total surimi utilization (demand), the year ending stock in PS&D table and the actual surimi import figures in the trade matrix. In 1998, due to the weak market condition for final surimi products in Japan, Japanese industry demands for raw material surimi for that year also declined to an estimated 404,000 MT, down 5 percent from a year ago level.

The overall market demand for raw material surimi in 1998 was much weaker than thought earlier as indicated by reduced Japan's annual total production of surimi based fish cake and fish paste products in 1998, which declined 2 percent from a year ago at 754,000 MT. This situation left the year ending stock left still higher than forecast earlier at 100,000 MT. Also, the surimi import from the U.S. turned out to be better than post's previous forecast at 112,000 MT due to better than anticipated demand and market prices for B-season surimi, particularly of high grade pollock prevailed during the second half. The 1998 US surimi figure was still down 19 percent compared to the previous year's actual.

MAFF's domestic surimi production estimate (offshore and onshore combined) in 1998 was 137,000 MT (still preliminary), down 5 percent and Japanese total surimi imports for that year reached 259,000 MT, down 16 percent

compared to the last year. Weak market prices for surimi prevailed up to the third quarter, high stocks, and weaker yen against the U.S. dollar were mainly attributable to the reduced surimi imports. In 1998, there were reportedly significant moves by U.S. processors to sell more high priced Pacific Whiting (PW), cod and pollock fillets to EU market etc., rather than taking low prices for surimi prevailed during last year.

PS&D Tables and Trade Matrices

PS&D Table: Salmon, Whole/Eviscerated

PSD Table						
Country	Japan					
Commodity	Salmon, Whole/Eviscerated				(MT)	
	Revised	1998	Preliminary	1999	Forecast	2000
	Old	New	Old	New	Old	New
Market Year Begin		01/1998		01/1999		01/2000
Beginning Stocks	108000	108000	104000	104000	105000	105000
Total Production	242000	242000	225000	225000	0	280000
Intra-EC Imports	0	0	0	0	0	0
Other Imports	224000	224000	245000	245000	0	225000
TOTAL Imports	224000	224000	245000	245000	0	225000
TOTAL SUPPLY	574000	574000	574000	574000	105000	610000
Intra-EC Exports	0	0	0	0	0	0
Other Exports	14000	14000	15000	15000	0	15000
TOTAL Exports	14000	14000	15000	15000	0	15000
Domestic Consumption	456000	456000	454000	454000	0	490000
Other Use/Loss	0	0	0	0	0	0
TOTAL Utilization	456000	456000	454000	454000	0	490000
Ending Stocks	104000	104000	105000	105000	0	105000
TOTAL DISTRIBUTION	574000	574000	574000	574000	0	610000

Import Trade Matrix: Salmon, Customs Clearance Basis

Import Trade Matrix			
Country	Japan		
Commodity	Salmon, Whole/Eviscerated		
Time period	Jan. - Dec.	Units:	1,000 MT
Imports for:	1998		1999
U.S.	40	U.S.	55
Others		Others	
Chile	93	Chile	65
Canada	6	Canada	8
Norway	37	Norway	65
Russia	41	Russia	40
Total for Others	177		178
Others not Listed	7		12
Grand Total	224		245

PS&D Table: Surimi

PSD Table						
Country	Japan					
Commodity	Surimi				(MT)	
	Revised	1998	Preliminary	1999	Forecast	2000
	Old	New	Old	New	Old	New
Market Year Begin		01/1998		01/1999		01/2000
Beginning Stocks	111000	111000	100000	100000	100000	100000
Total Production	137000	137000	130000	130000	0	135000
Intra-EC Imports	0	0	0	0	0	0
Other Imports	259000	259000	260000	260000	0	275000
TOTAL Imports	259000	259000	260000	260000	0	275000
TOTAL SUPPLY	507000	507000	490000	490000	100000	510000
Intra-EC Exports	0	0	0	0	0	0
Other Exports	3000	3000	5000	5000	0	5000
TOTAL Exports	3000	3000	5000	5000	0	5000
Domestic Consumption	404000	404000	385000	385000	0	395000
Other Use/Loss	0	0	0	0	0	0
TOTAL Utilization	404000	404000	385000	385000	0	395000
Ending Stocks	100000	100000	100000	100000	0	110000
TOTAL DISTRIBUTION	507000	507000	490000	490000	0	510000

Import Trade Matrix: Surimi, Customs Clearance Basis

Import Trade Matrix			
Country	Japan		
Commodity	Surimi		
Time period	Jan. - Dec.	Units:	1,000 MT
Imports for:	1998		1999
U.S.	112	U.S.	115
Others		Others	
Russia	13	Russia	13
Chile	14	Chile	14
Argentina	21	Argentina	20
Thailand	68	Thailand	72
China	11	China	12
Hong Kong	2	Hong Kong	0
R. Korea	5	R. Korea	4
Total for Others	134		135
Others not Listed	13		10
Grand Total	259		260