

3 Domestic Production Trend

Domestic production of sea urchin has shown a gradual decline during the past 10 years, as indicated in the chart below.

Table 2

Domestic Production (Metric Tons)

	In Shell	Converted* to Roe
1979	26 500	3 180
1981	23 984	2 879
1983	25 254	3 030
1985	22 745	2 729
1987	22 760	2 731
1988	22 000 (est.)	2 640

*12 per cent yield rate utilized.

Source: Japanese Ministry of Agriculture, Forestry and Fisheries.

The yield rate for domestically harvested sea urchin roe is normally 12 to 15 per cent on average. Because the yield rate is lowered during delivery from the harvesting site to the processing centre, a yield rate of 15 per cent or over is generally required for live sea urchin at the source abroad, in order to attain a yield rate of 11 or 12 per cent after processing in Japan.

4 Imports

Imports of sea urchin, which were quite stable prior to 1984, began increasing quickly that year. Over the past five years, volume has doubled. Imports now account for nearly two-thirds of consumption and will supply all future increases in market demand.

The major suppliers, as shown below, are Korea and the United States. Imports from Canada have shown a rapid growth in recent years and this trend will likely continue.

Table 3

Japanese Imports of Sea Urchin Roe (Metric Tons)

Country	1982	1984	1986	1988
Canada	24	132	176	457
United States	491	539	1 243	1 750
Republic of Korea	1 100	1 219	1 158	1 292
North Korea	407	322	239	436
China	146	158	225	242
Taiwan	118	37	61	33
Hong Kong	12	15	57	79
Philippines	14	23	79	58
Mexico	5	32	98	75
Chile	59	155	263	223
Australia	—	—	—	7
Total	2 397	2 636	3 601	4 651

Note: Statistics also include live sea urchin.

Source: Japanese Ministry of Finance.

As indicated below, on a value basis, Japan's imports of sea urchin amount to \$173 million, and represent more than a four-fold increase since 1982. Canadian exports during this period have increased from minimal quantities to \$13 million.

Table 4

Value of Imports of Sea Urchin Roe (C\$ Million)

Country	1982	1984	1986	1988
Canada	0.5	2.9	4.9	12.9
United States	11.6	13.6	36.9	66.1
Republic of Korea	22.2	32.9	49.3	76.1
Total	39.8	55.8	103.2	172.9

Source: Japanese Ministry of Finance.