

- Payment is immediate and the physical distribution is centralized. The system also acts as information centres and as food safety safeguards.

- There are two non-wholesale systems: direct between origin and retailers and direct origin to consumers. A large increase has occurred in the latter, using door-to-door transport systems.

Changes in Retail Business:

- There has been substantial growth in the last few years in the variety of supermarket and chain department stores. There is still a controversy in Japan over changes to the Large Store Laws. At the time of writing, Japan has promised to modify the laws to permit faster licensing of such stores. There have been significant changes in specialized fish retailers as they are not being replaced on retirement, only exclusive product stores are surviving.

- larger stores are re-furbishing, adding food sections, usually in the basement or sub-basement, emphasizing live and fresh fish and high-quality products. There is a large volume of backed-up supply.

- Upstream, down and side-stream descriptions are no longer applicable. The demand is too strong and its nature has changed i.e. no longer whole fish, but dressed and processed fish (i.e. fillet or steaks, etc.) are the current larger market needs. The option of whole fish is still extant, for the older generation and for the sashimi market, which is still growing. There is a great need for labour in Japan in the unskilled jobs associated with fish-processing.

- The new section of Narita airport (Tokyo) and the Osaka Wholesale centre will increase access to the distribution system.

Aquacultured Fish:

- There is considerable aquaculture activity in Japan, although most of it is at small levels. Currently 25 species are being cultivated.

- There is a problem of market saturation that will require new varieties of species.

- There is also a problem with labour problems in the fish distribution system and increased concern of producers over distribution and supply stagnation in Japan. Oversupply is a problem, but increasing the range of products and developing new aquaculture products for the Japanese supply should alleviate this problem.