

JAPAN

SUPPLY AND CONSUMPTION

The salmon and trout species available in Japan fall into five categories: (1) fall Chum salmon returning to spawn in the rivers into which they were originally released, primarily caught in fixed nets; (2) spring season salmon and trout from the North Pacific and the Japan Sea; (3) silver salmon bred in sea water; (4) imported fish from the U.S. and Canada, mainly non-captive-bred red Salmon; and (5) captive-bred salmon and trout primarily from northern Europe and Chile. Japanese domestic production for the first three categories was estimated at 187,000 tonnes in 1989. An increase in the number of young fall chum salmon released into Japanese rivers has resulted in greater numbers returning to spawn in recent years. Silver Salmon has also enjoyed a rapid increase in production during recent years. Quota restrictions on the size of Japanese catches in Soviet waters has resulted in a decrease in the spring landings of salmon and trout.

Until 1975, North Pacific salmon (**hokuyo sake**) and North Pacific trout accounted for the majority of domestic output. A gradual strengthening of restrictions on offshore fishing resulted in a steady erosion of earnings to the point where catches have been reduced to about 20,000 tonnes, or 20 percent of past landings. Compensating for the decline in North Pacific salmon is the fall chum salmon. Long-term research has shown the number of salmon returning to spawn has increased dramatically: in 1975, approximately 17.5 million salmon came back to spawn resulting in 58,000 tonnes of landings; by 1986, the number had increased to approximately 48.6 million fish, or 155,000 tonnes of landings. Earnings from fall chum have been stable and good stocks levels are being maintained.

Captive breeding of silver salmon has been increasing steadily over the past decade in Japan. Production is centered in **Miyagi Prefecture**, with this area accounting for almost 90 percent (10,000 tonnes) of the total output. Silver salmon from Miyagi are regarded as being of high quality. The salmon farming industry in Japan faces a major problem from salt water pollution, consequently, the short-term prognosis for the sector is that there will not be significant growth. Annual domestic Japanese production has been stable at 180,000 tonnes. Output of salmon has been increasing, trout production has experienced a downturn and now accounts for only 10 percent of total salmon and trout production. **Hokkaido** accounts for approximately 80 percent of salt-preserved salmon and trout. Production of smoked salmon and trout has increased rapidly, growing by 400 percent over the last ten years. Japanese production of canned salmon and trout has fallen.

Japan is the largest importer of marine products in the world. In 1989, total imports were 2.3 million tonnes worth US\$10.5 billion. Third in importance were salmon and trout at \$940 million, or nine percent. Salmon and trout have always been favourite species in the Japanese market and have been indicators of the general demand in the domestic