

# Overview of the Japanese Market

Japanese Consume 90% of World Uni Consumption  
But.....?

Uni in the 100g pack in the  
brine



Red and White



Yoshi Oyama, Director of Japan International Food  
& Aquaculture Society

Tukiji Fish Market was closed on 6<sup>th</sup> Oct. 2018 since 1935



## Uni Auction Area

Click the link left to see  
the view of auction  
Control + click

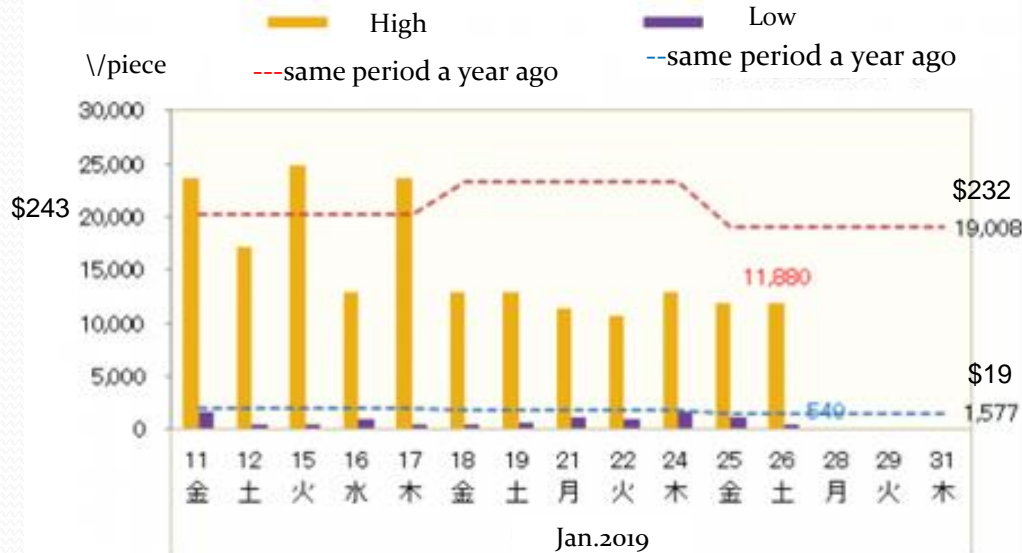
## Middlemen's Area Below





# Uni Price- high & low on average Domestic Uni

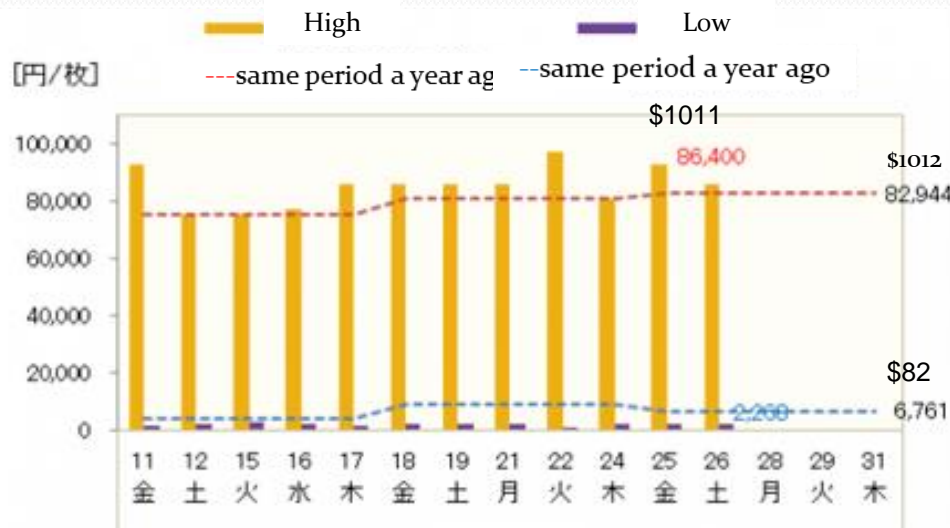
Daily wholesale Price- Toyosu Fish Market, Red Uni



Big Price Differences  
Daily 8,000 pieces sold



Daily wholesale Price- Toyosu Fish Market, white Uni



地での評価No.1

250g~300g  
Branded Uni  
\$230



# Luxury Food- Uni in local areas

well-balanced sweetness and no bitterness  
and astringency plus color and texture

***Anthocardiaris crassispina***

***Heliocardiaris crassispina***

Widely found in Japan



***Puicherrimus***

Northern Japan



***Pseudocentrotus Depressus***

Southern Japan



***Tripneustes gratilla***

Okinawa

White Moustache Uni





# Variety of Processed Uni



1,399円



1,280円



1,100円



1,280円



1,980円



1,300円



1,026円



1,380円



648円



3,999円



2,980円



1,000円



1,180円



880円



4,980円



4,309円



# Variety of Processed Uni in Hokkaido



100g 4298円



290g 1500円



10800円



生ウニ(板) 100g 4298円



殻付バフンウニ 3個 3300円



新鮮ウニを缶詰めに  
むしうに 1,296円



塩水ウニ 100g 5370円



1410円



80g 2980円



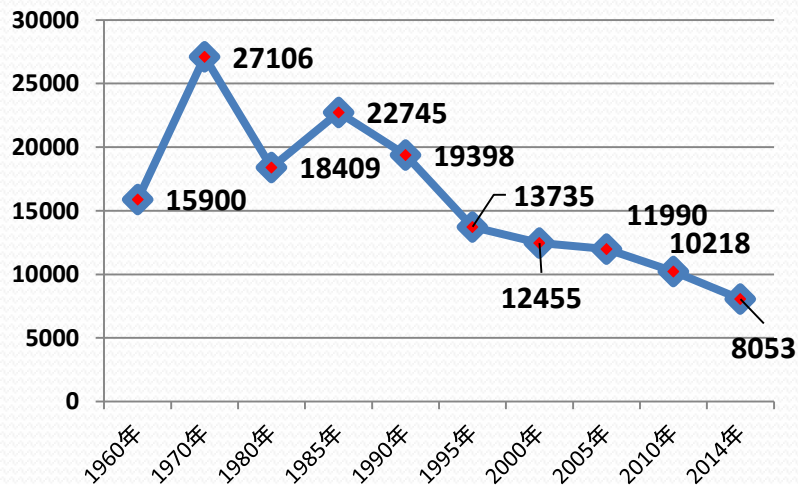
ウニイカ 500g 3240円 6

# Uni Domestic Catch

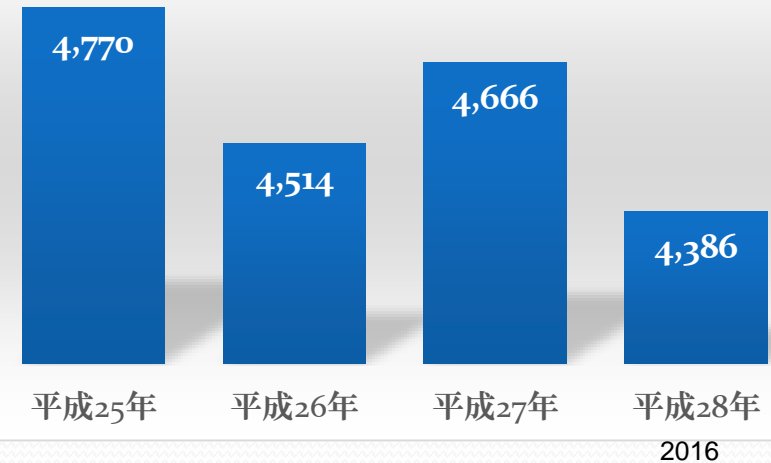
## ◆ Drastic change of Uni demand & Supply

- Japanese Uni production has been declining (chart 1)  
(No Uni ingredients for further processing by Uni processor.
- No Uni resources found in Okinawa regardless of huge efforts.
- There may be danger Uni disappeared from Hokkaido!
- **There is no chance to increase Uni harvest without aquaculture.**

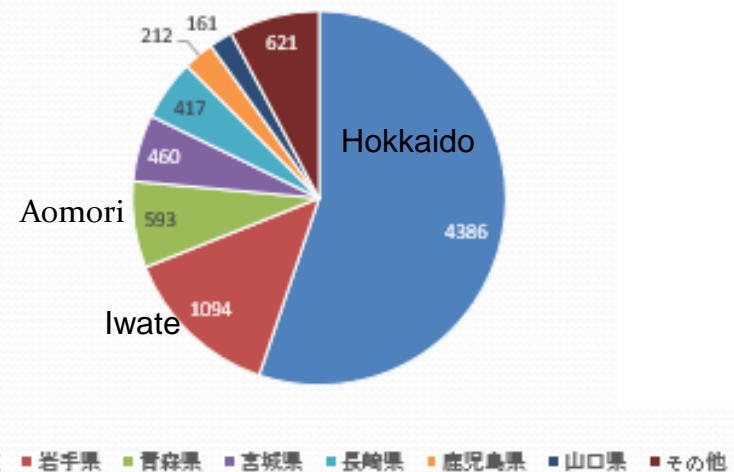
Chart 1: tone



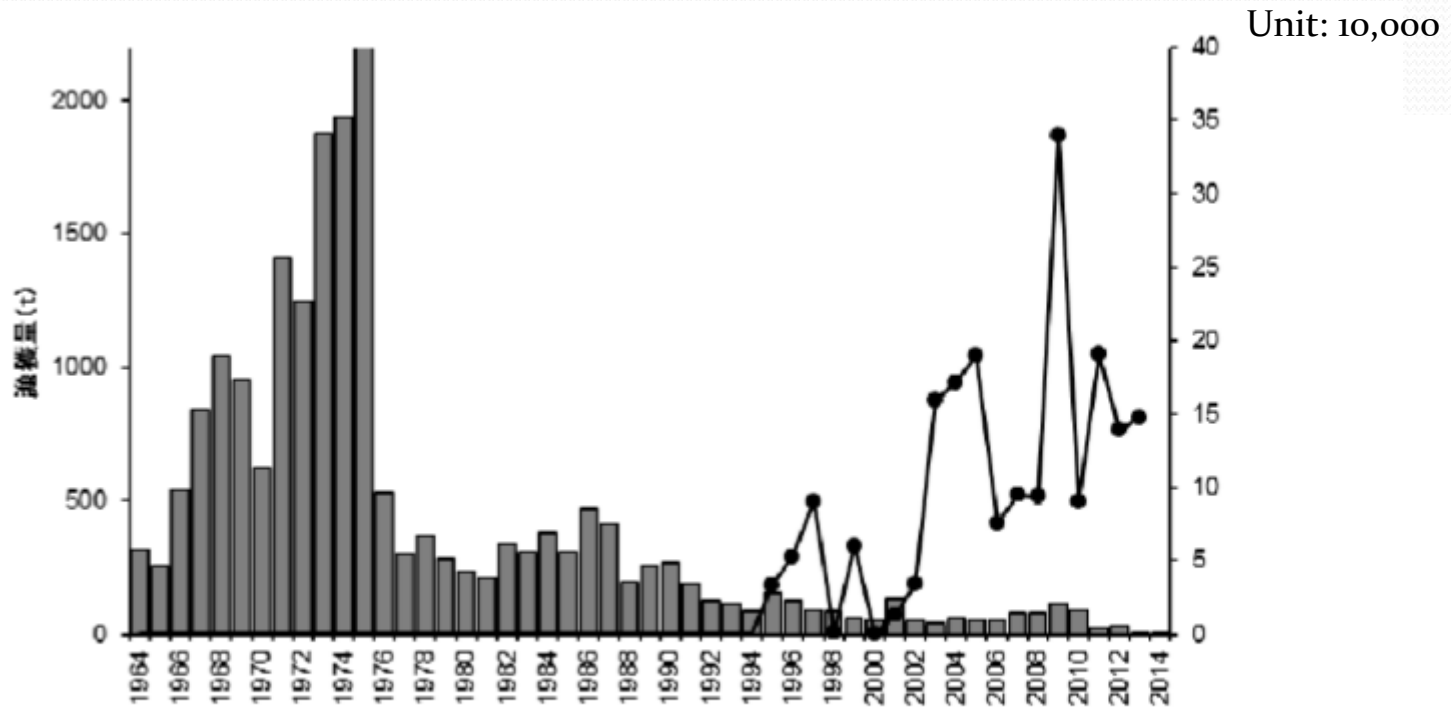
## Uni production in Hokkaido



## Uni Production by Prefecture



# White Moustache Uni in Okinawa (*Tripneustes gratilla*) was disappeared!



- ❑ 2000 tons Uni catch in 1974. This was a down to nearly zero in 2014.
- ❑ Release of Uni spat started in 1994 but did not achieve good result at all.



# Uni Imports

Imports has been increasing but demand of other countries also has been increasing.  
Quality & DI in Chili was worsened in 2018.

Live Unit: tones, import statistics

	2017	2018	Share	Growth%
Russia	8,016	8,129	95.73%	101.40%
U.S.A.	119	122	1.44%	102.30%
Canada	210	242	2.85%	115.00%
Others	8	0	0.00%	
Total	8,363	8,492		101.70%

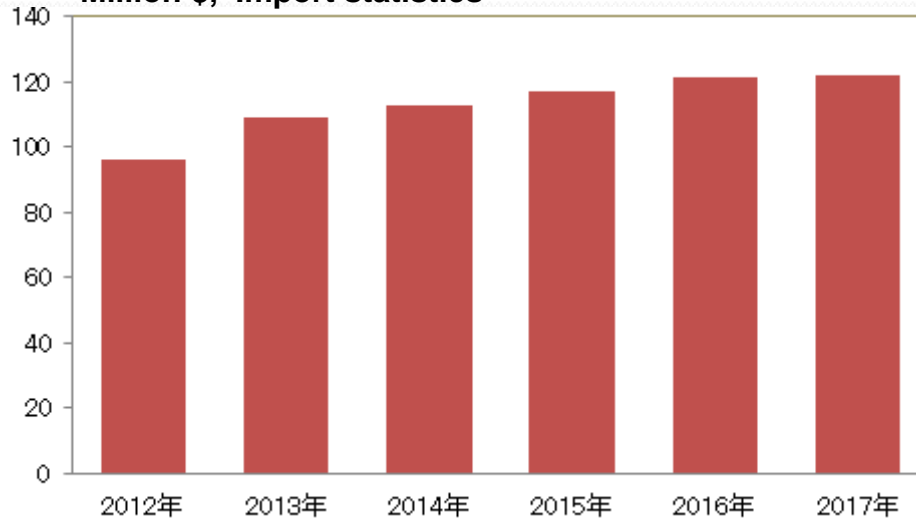
Fresh

	2017	2018	Share	Growth%
Canada	218	175	33.59%	80.30%
U.S.A.	129	93	17.85%	72.10%
China	131	70	13.44%	53.50%
Others	176	183	35.12%	103.70%
Total	655	521	100.00%	79.60%

Frozen

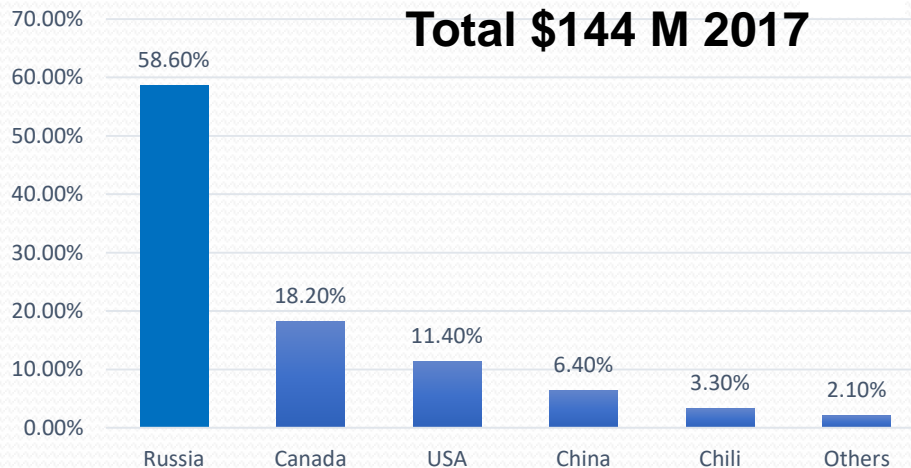
	2017	2018	Share	Growth%
Chile	1,890	1,637	92.38%	86.60%
Canada	34	41	2.31%	119.90%
Others	84	95	5.36%	112.40%
Total	2,008	1,772	100.00%	88.2%

Million \$, Import statistics



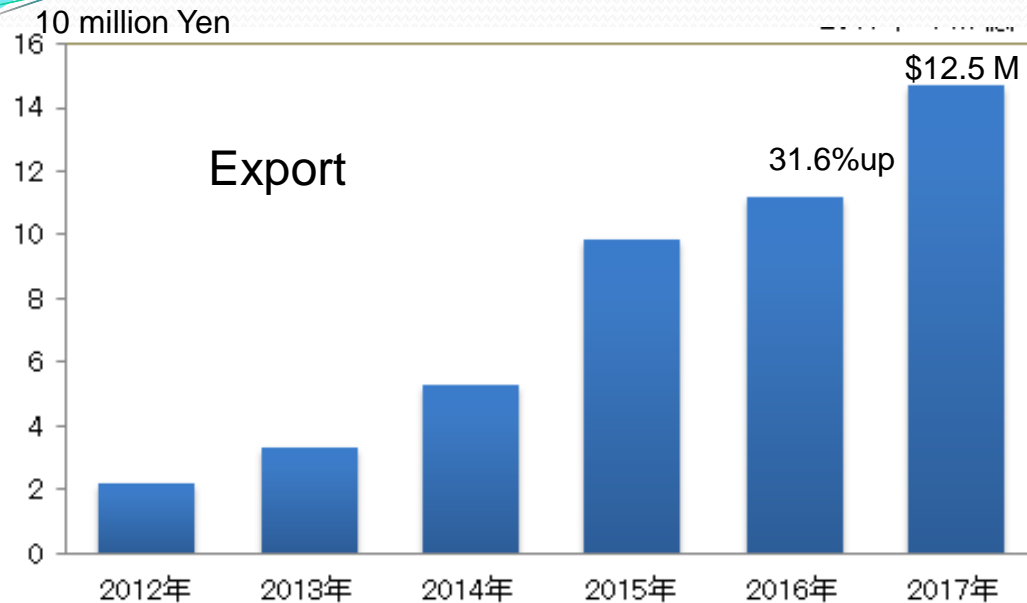
Market share of exporting countries

Total \$144 M 2017



# Uni Exports from Japan?

Demand for Uni has been increasing in overseas.



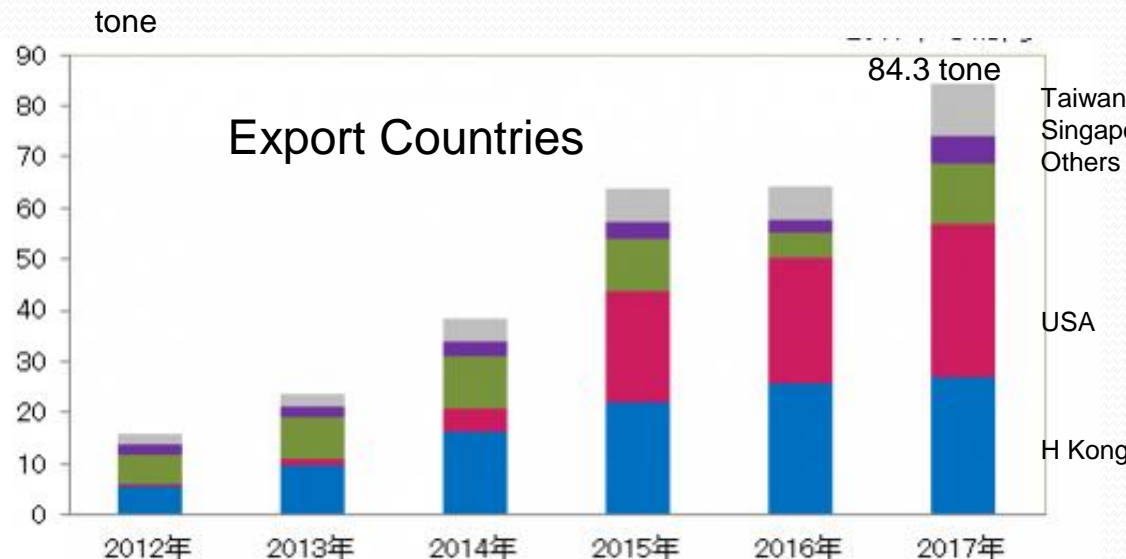
Japanese cuisine is becoming very popular particularly in Asian countries and North America.

Hence, many Japanese Sushi chains go abroad.

Fresh Uni if shipped in day 1, this will be available next morning in Asian countries which is served on that day.

Can export much higher prices than Japanese prices.

Australia can also look at other Asian countries as the export market.





# Monthly Price fluctuation and Increasing Price

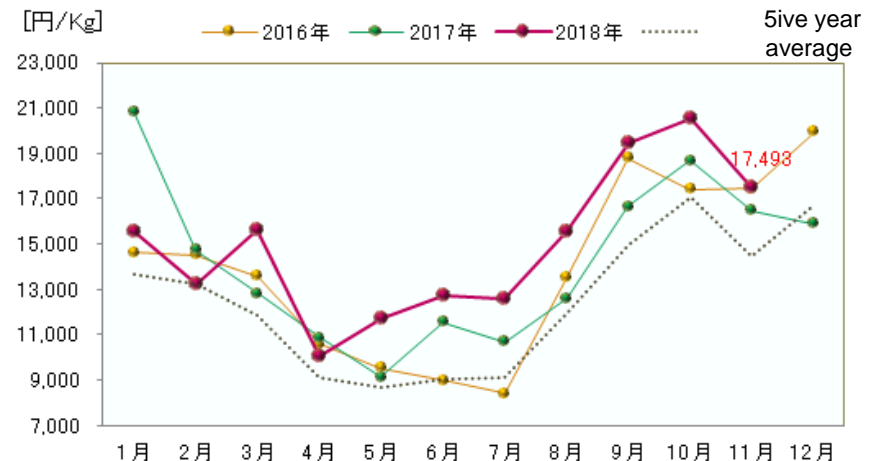
- ❑ Price fluctuation of domestic Uni is very large.
- ❑ Price increases to 3 times more in the Last 3~4 months in the off-season of domestic Uni.
  - Aquaculture has advantages in that harvest can be controlled and supply more in the last 4 months of the year.
- ❑ Price increases every year due to reduced catch of Uni in Japan.
  - High opportunity for land based Uni farming
- ❑ Price of imported Uni is quite stable. Different country has different supply season.



Price increases, worsened quality,  
Unstable supply, production reduction

**Likely significant high opportunity  
of Uni farming**

Wholesale price of domestic Uni



市場統計情報(月報)

Wholesale price of imported Uni



【データ出所】 東京都 中央卸売市場日報、市場統計情報(月報)

# What will come next? Recent trend of aquaculture in Japan



## **Marine Culture**-for red sea urchin.

I think this is the only commercial marine culture but is limited scale.

This method is urchin raft and grow Uni from spat.

Why not successful?

- Water exchange is not so good.
- Temperature control is difficult
- Salinity changes
- Availability of natural feed.



## **Land culture**

Obtain old, low GI Uni and they are brought into the tank in the closed system or water run through system and grow 2~3 months. Artificial feeds is mainly used.

Feeds developed by Nofima, Norwegian organization with mix of other ingredients are supplied to aquaculture farmers. Japanese feeds manufacturer improved growth and taste.

It was reported 0.8% GI. was Improved to around 15% in 10 weeks.



## **Land culture**

This is similar to the above method except the feeds used. It has been reported that Uni fed with cabbage and lettuce which was not used for human consumption was resulted in good GI (16% or so) and good color & taste.

Hence several companies, fishery cooperatives have started Uni farming with this method



Australia exports 6.0% of fresh & child Fin Fish, 45.9% processed abalone and 5.7% live abalone to Japan in 2017.

## Why not Uni ? Thanks

Need high quality feeds and aquaculture system

