



The Influence of the Great East Japan Earthquake

Groundfish forum 2011

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The devastating Great East Japan earthquake



A tragic disaster caused by the earthquake and the subsequent, unpredictable giant tsunami

The devastating Great East Japan Earthquake



The earthquake and tsunami devastated Tohoku and other regions. (Damages were also inflicted in Kanto district.)

- The number of deaths : 15,787
- The number of injured : 5,932
- The number of missing : 4,059
- The number of those evacuated : 68,596

The devastating Great East Japan Earthquake



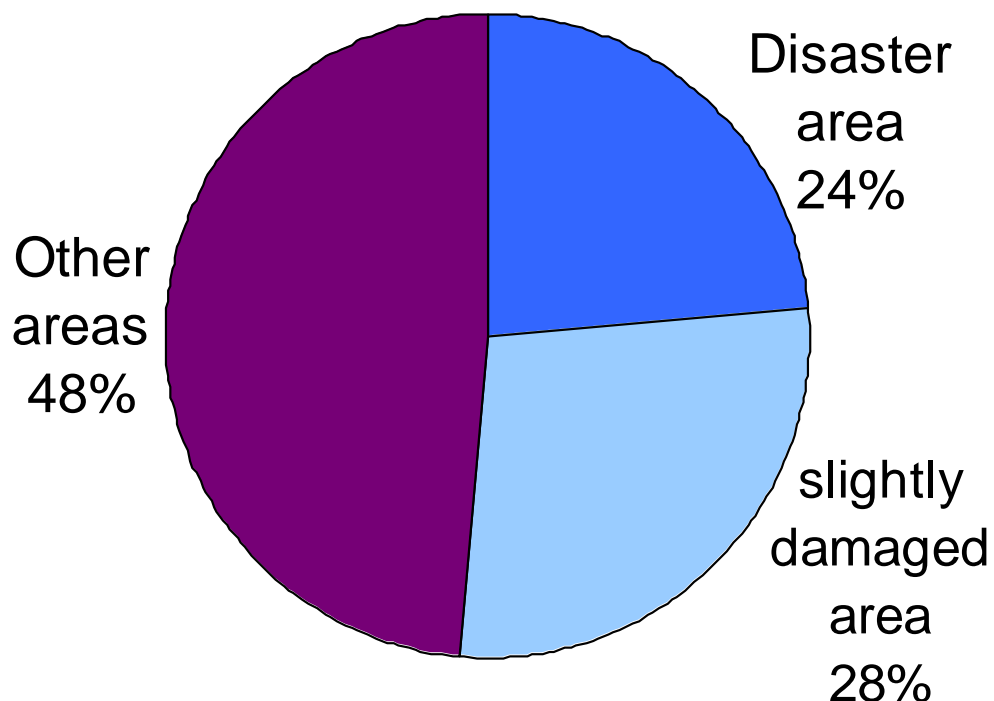
Power, gas, and water supplies were disrupted in many areas, mostly in the Tohoku region. Roads, railways, airports and other infrastructure were also severely damaged.

Now, Almost all roads have been reopened, including the Tohoku Expressway, most of the Joban Expressway as well as national highways. Railways are also back in operation.

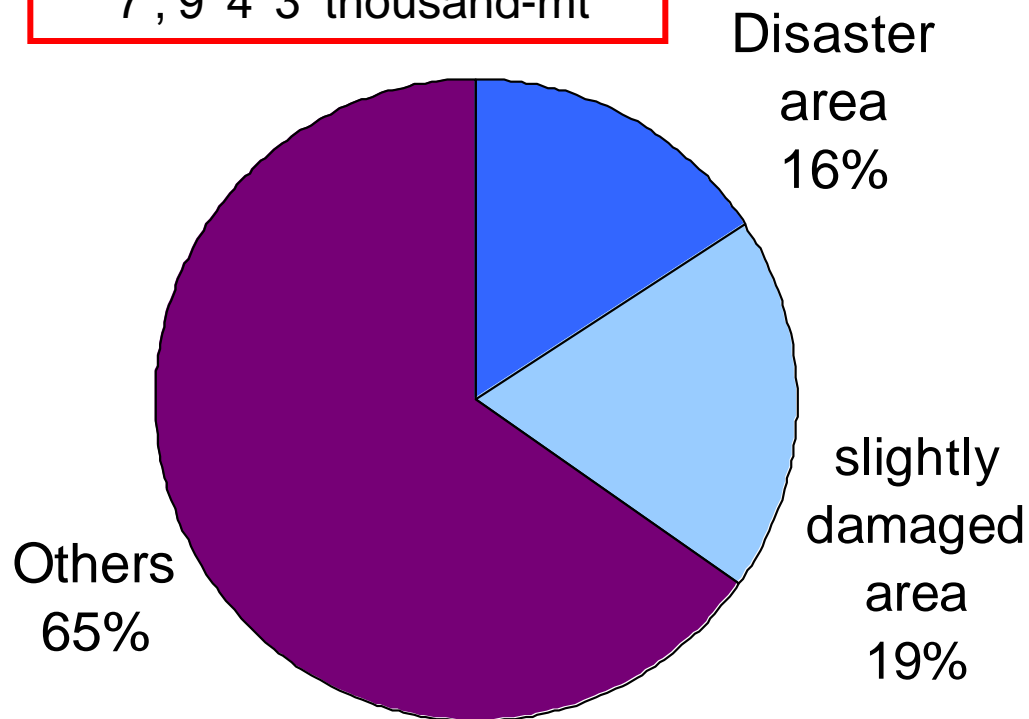
The earthquake aftermath

* Influence on fish supply *

① Domestic supply :
Wild caught + Farm raised
5,348 thousand-mt



② Total supply :
Domestic supply + import
7,943 thousand-mt



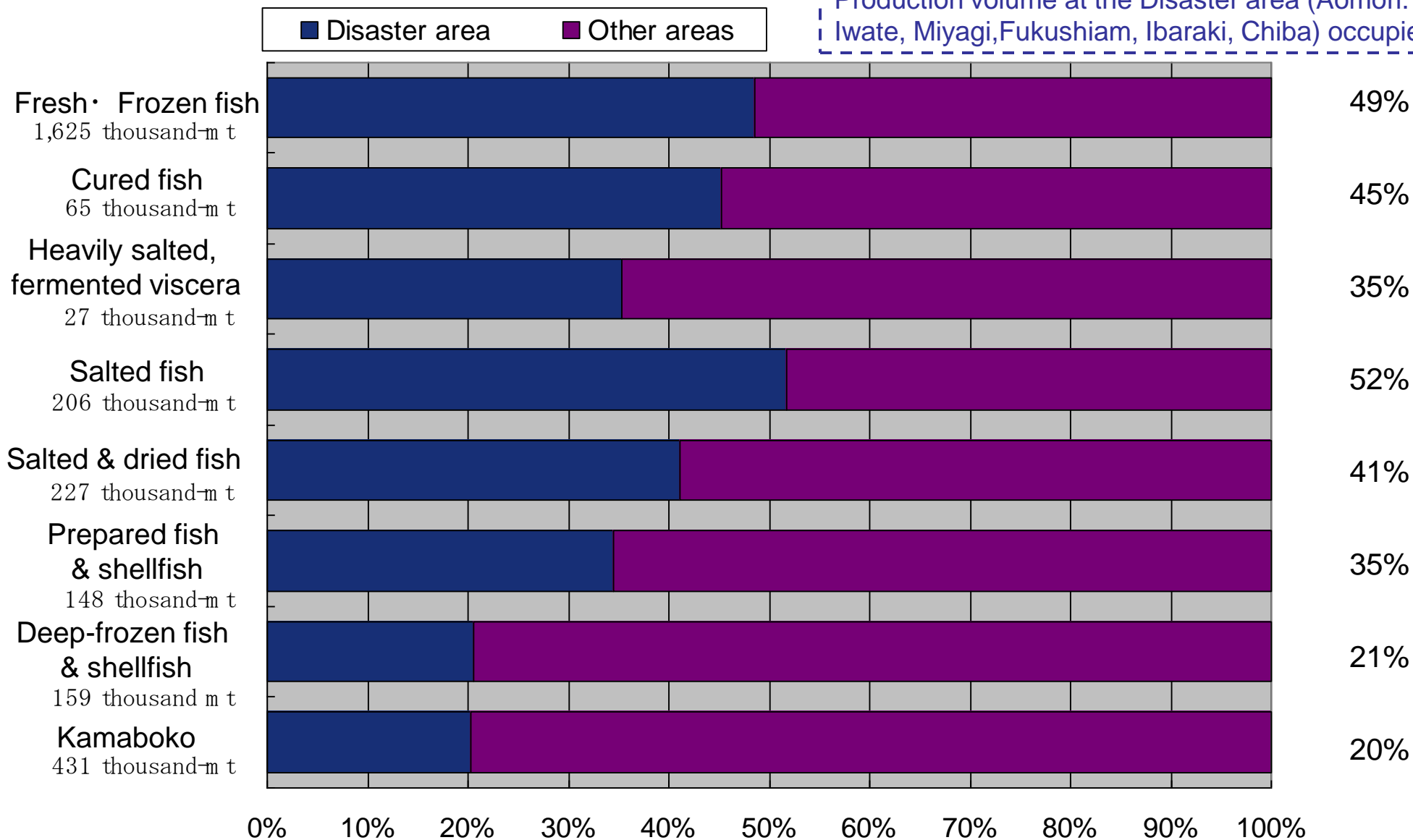
Disaster area : Aomori, Iwate, Miyagi, Fukushima, Ibaraki, Chiba
Slightly damaged area : Hokkaido

The earthquake aftermath



* Processed Seafood in the Earthquake Area *

Production volume at the Disaster area (Aomori, Iwate, Miyagi, Fukushima, Ibaraki, Chiba) occupies



The earthquake aftermath



* Influence on the fish-supply *

The numbers of the devastated facilities in disaster area & Hokkaido

	Fishing port			Fishing boat			Whole sale market			Processing facility		
	Total	Damaged	%	Total	Damaged	%	Total	Damaged	%	Total	Damaged	%
Aomori	92	18	20%	6,990	620	9%	7	3	43%	119	57	48%
Iwate	111	108	97%	10,522	9,673	92%	13	13	100%	178	144	81%
miyagi	142	142	100%	13,570	12,023	89%	10	10	100%	439	378	86%
Fukushima	10	10	100%	1,068	873	82%	12	12	100%	135	105	78%
Ibaraki	24	16	67%	1,215	488	40%	9	6	67%	247	77	31%
Chiba	69	13	19%	5,640	405	7%	2	0	0%	420	31	7%
Sub. Total	448	307	69%	39,005	24,082	62%	53	44	83%	1,538	792	51%
Hokkaido	282	12	4%	16,293	793	5%	52	15	29%	570	31	5%
Total	730	319	44%	55,298	24,875	45%	105	59	56%	2,108	823	39%

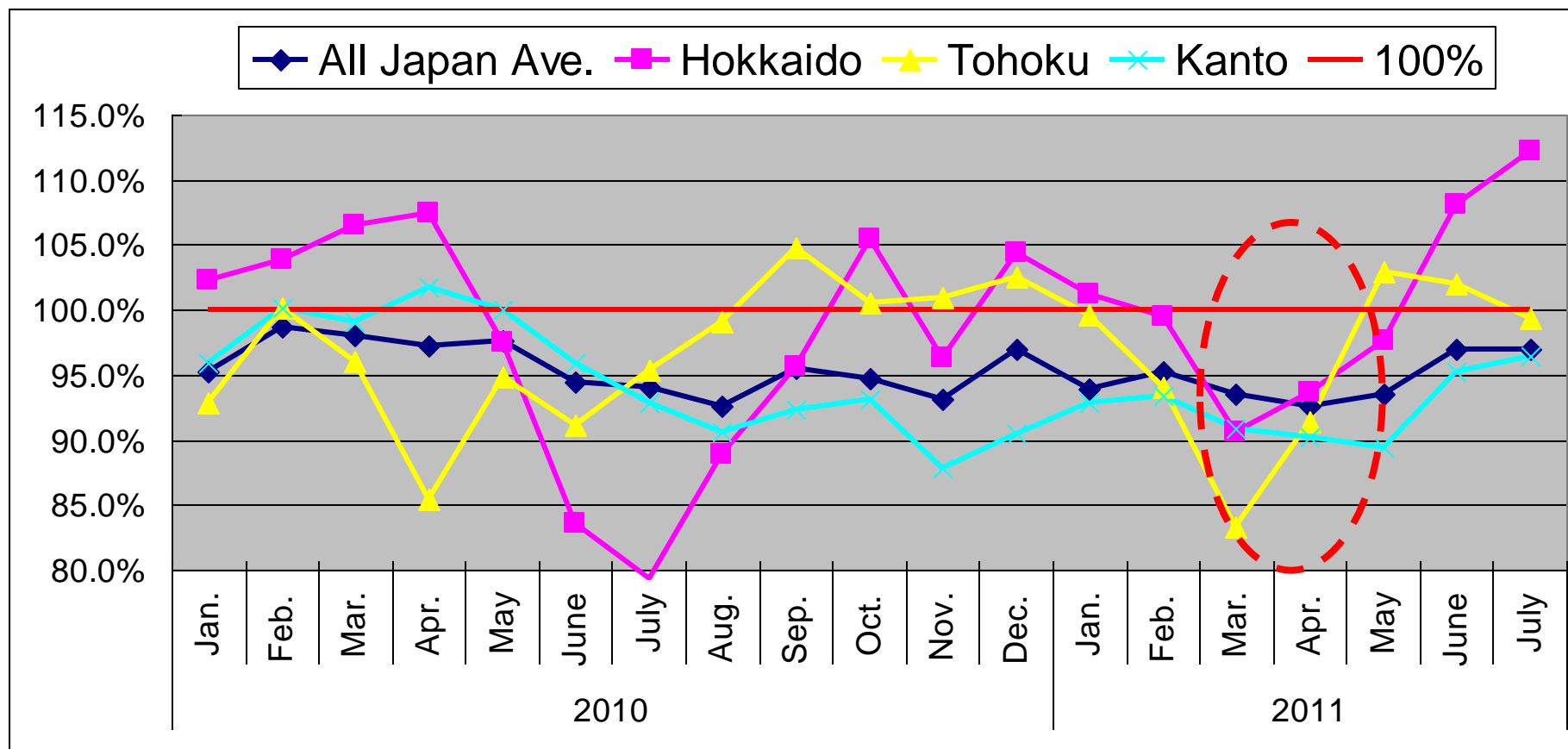
*As for Hokkaido, the numbers being gathered at the areas along pacific ocean

The earthquake aftermath

* Influence upon the consumption *

Consumption expenditure per house-hold

Seafood : Comparison with the year-earlier month



* Consumption of the seafood in Japan has been downward.

* The influence of the “Great East Japan Earthquake” is incredibly huge.

- 1) Output of the fishery product at Pacific Ocean along Tohoku region, Chiba and Hokkaido (being slightly damaged), occupies 52% of total domestic supply, which also occupies approx. 35% of total supply of the fishery product (including imports) in Japan.
- 2) The share of the suppliers for the processed seafood product in Tohoku region is greater than the any other regions.
The loss of those facilities influences the supply of processed seafood product to the market.

* Consumption of the seafood in Japan has been downward.

* The influence of the “Great East Japan Earthquake” is incredibly huge.

3) Tohoku region also has a big share of the market for seafood consumption.

4) When the damage levels of Kanto and Tohoku are combined, the total area represents an area consuming approximately 50% of seafood consumed in Japan.

5) The people in these areas suffered huge physical damages, which may have a negative effect on future consumption.

Question

During the period of the reconstruction in Tohoku region, would you like to purchase the products outputted there, positively?

Hard to judge, depends upon the situation hereafter 18.7%

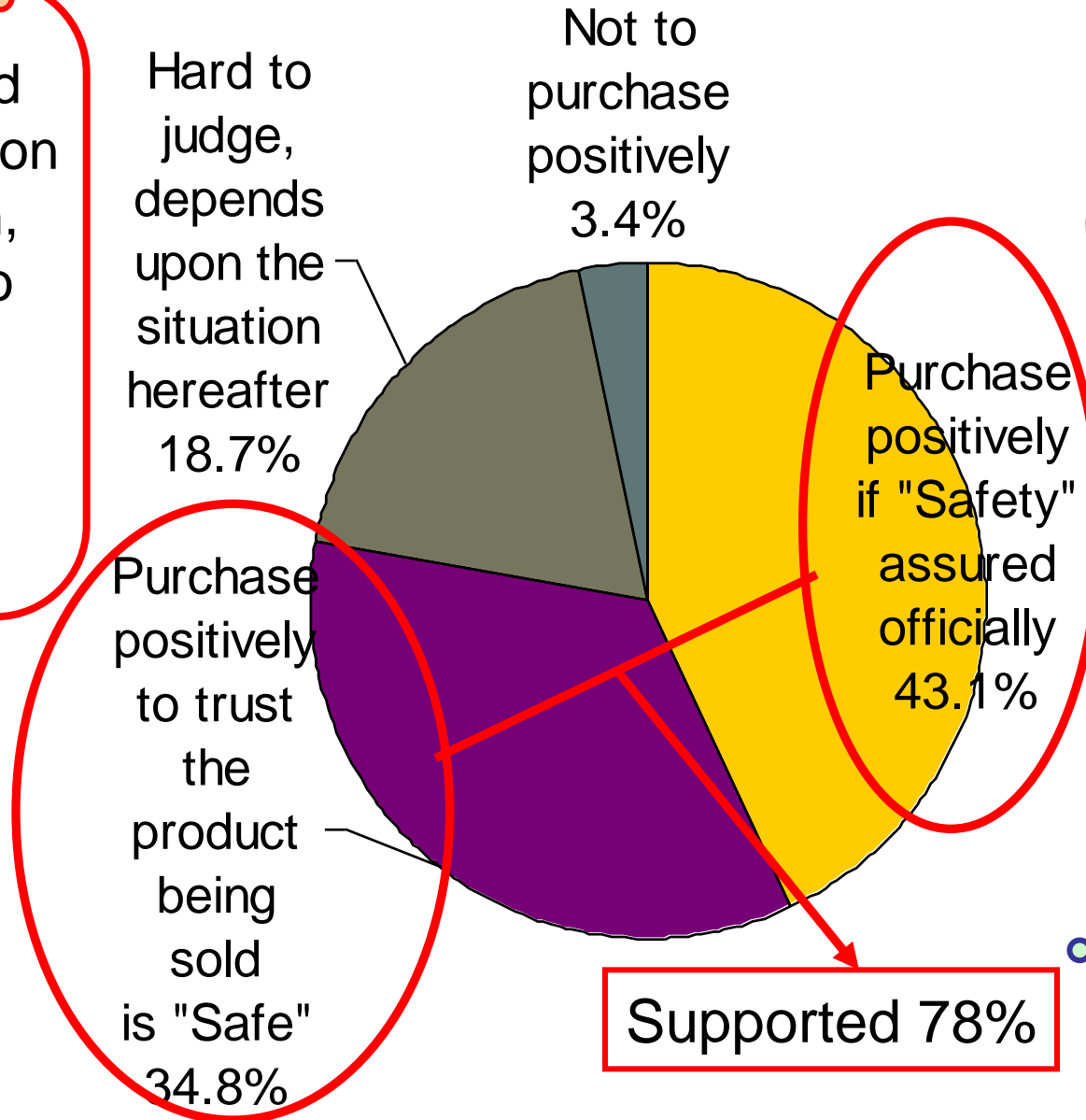
Not to purchase positively 3.4%

Purchase positively to trust the product being sold is "Safe" 34.8%

Purchase positively if "Safety" assured officially 43.1%

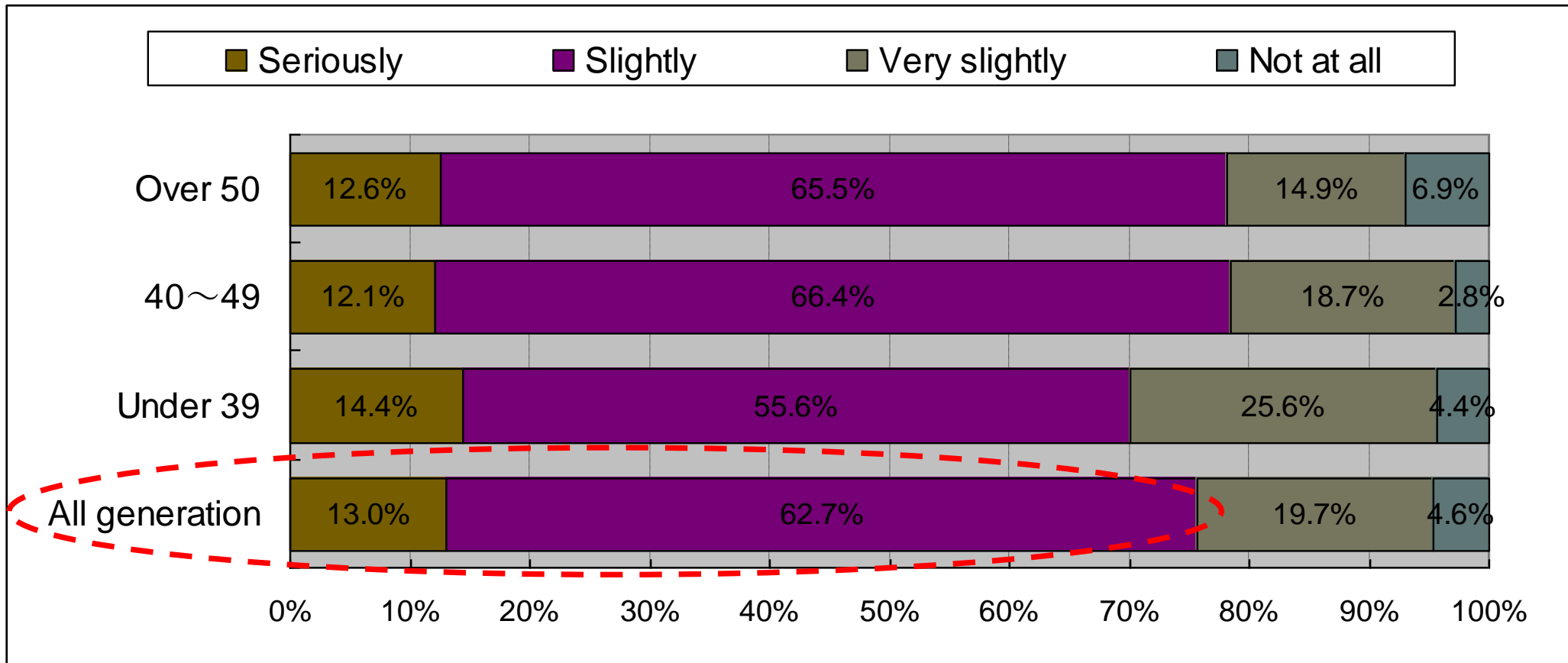
People think we should behave rationally

Supported 78%



Question

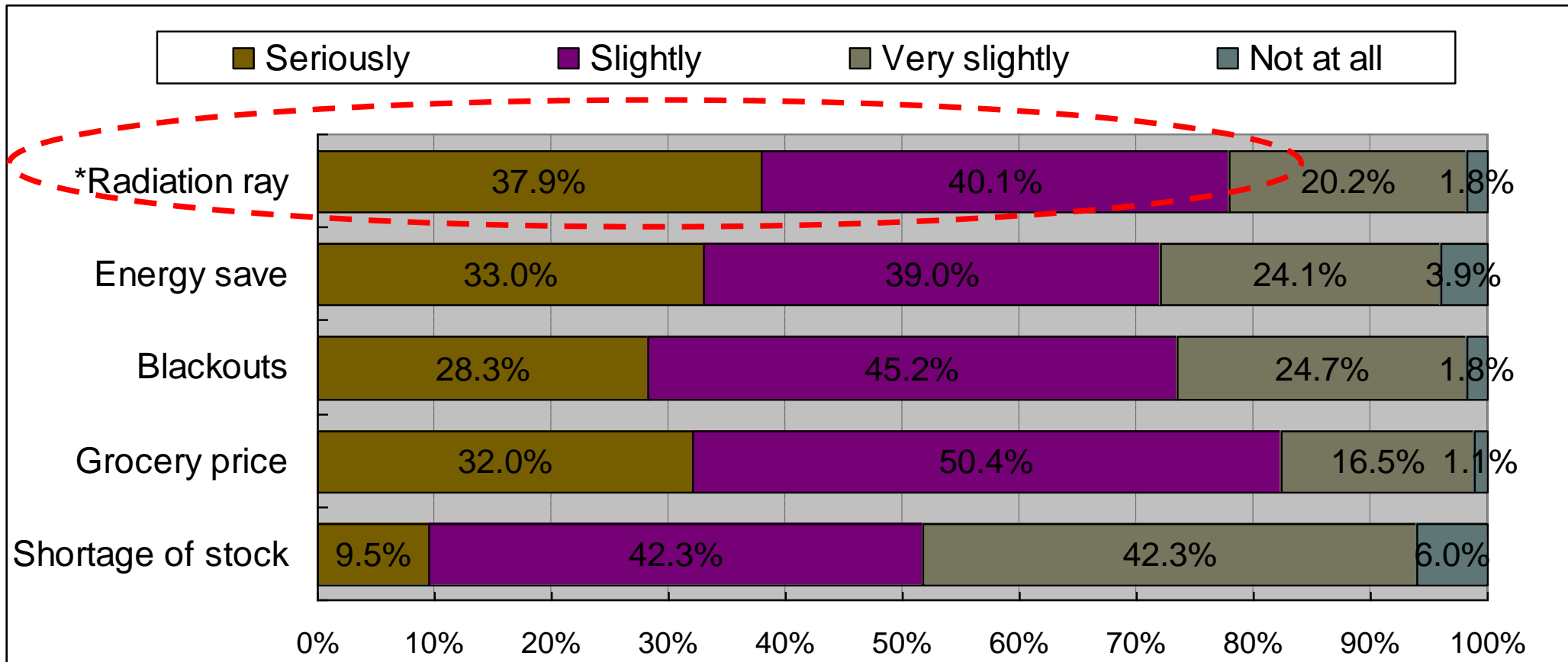
* Do you feel any change of your mind/behavior on “Purchasing grocery” after “the Great East Japan Earthquake”?



Question

* The Radiation Issue?

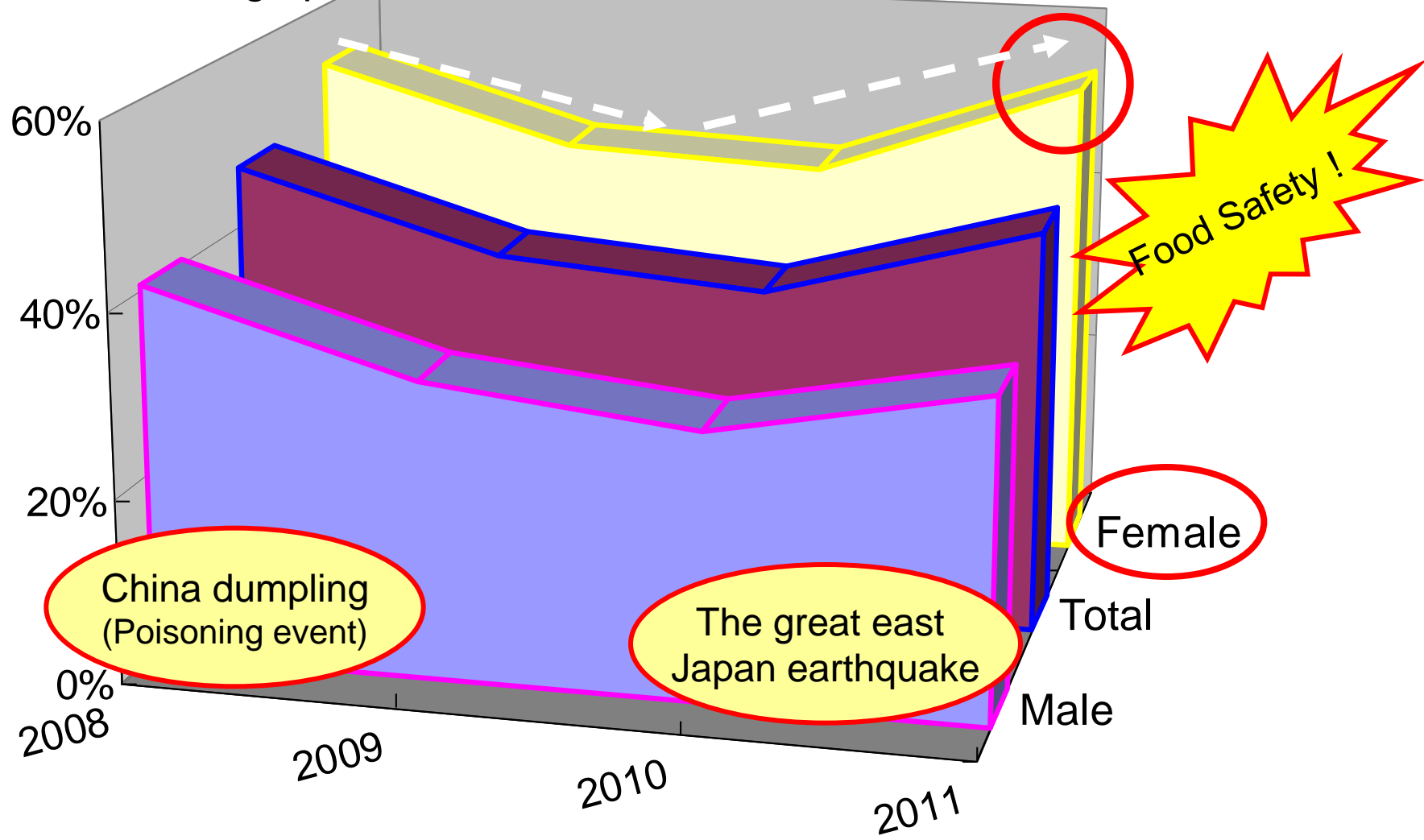
(Do you feel insecure on your dietary habit this summer, after the earthquake?)



* Concern for the fresh-frozen fish / shellfish *

Question : Would you stop purchasing groceries due to the anxiety for food safety

even though price decreased ?



Unpredictable future for the seafood industry



Export of the seafood (year 2010)

	Volume (mt)	Amount (Million yen)	Destination for export (Top3)		
Mackerel (chilled Frozen)	120,416	10,073	Egypt	Thailand	China
Pacific saury (Frozen)	60,382	5,132	Russia	China	U.S.A.
Chum-salmon (fresh chilled frozen)	65,166	17,978	China	Thailand	Vietnam
Pollock (fresh chilled frozen)	63,478	7,733	Korea	China	Russia
Squid (fresh chilled frozen)	31,352	4,860	China	Vietnam	Peru
Bonito (fresh chilled frozen)	62,322	7,266	Thailand	Indonesia	Philippine
Tuna (fresh chilled frozen)	17,445	6,298	Thailand	Guam	Hong kong

Reference :	
Domestic catch (mt)	
*2010	2009
458,600	470,900
217,400	310,700
148,659	190,033
241,000	227,300
244,100	295,800
303,900	268,500
188,000	207,400

* Catch in year 2010 is tentative, excluding the figure at Iwate-prefecture, because of the influence of the earthquake and the subsequent giant tsunami.

- Primary origin of the seafood for export, is Sanriku area of Tohoku region.
- Pacific saury : Canned and consumed in Russia.
- Chum-salmon : Processed in China and being exported for and consumed in western countries.
- Pollock : Consumed in Korea, and Processed in China and being exported for and consumed in western countries.

⇒ There have been some import bans put in place from affected areas .

Now, we worry about other factors

J-Yen/US\$ for 2 years



True Global Links



Thank you for your attention