

The Current Status and Challenges of Tuna Culture in Japan

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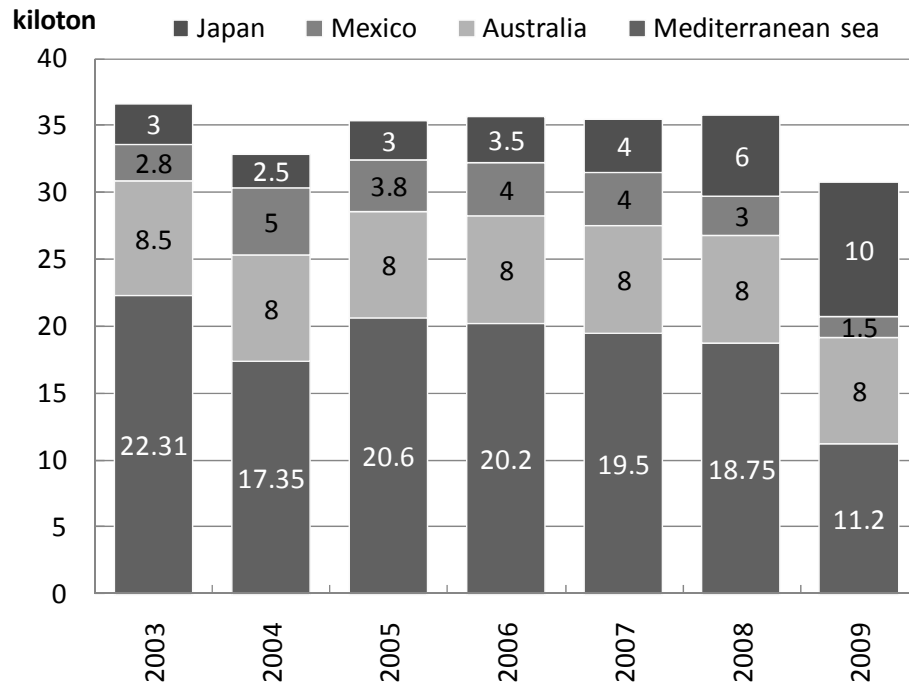
Cultured tuna production in the world

1. Production trend in the world

- ◆ Mediterranean sea : decreases in 09
- ◆ Australia : stable
- ◆ Mexico : unstable
- ◆ Japan : increase

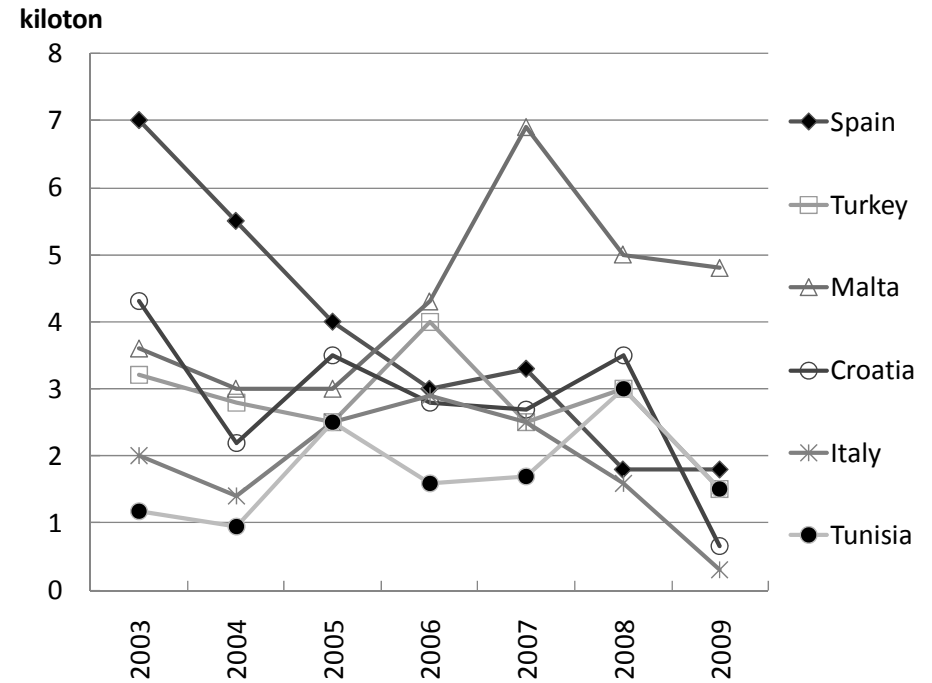
2. Mediterranean sea nations

- ◆ Spain: Retreat
- ◆ Malta and Turkey: Rise
- ◆ Movement of company



Cultured tuna production in the world

Source: Suisan Times and Minato Newspaper



Cultured tuna production in the Mediterranean sea nations

Current Status of tuna culture in Japan

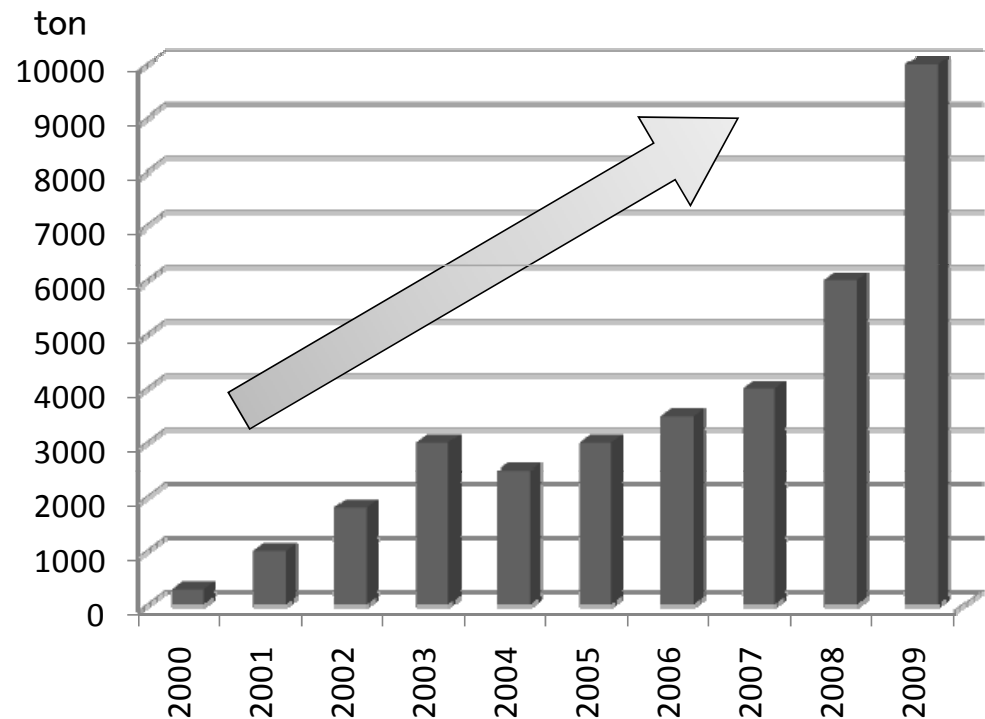
Tuna aquaculture has developed since the latter half of the 1990's, and it's still active. This year's production is expected 10,000 tons. The number of aquaculture company was 68 in 2008 (include individual).

With the increase of the tuna aquaculture companies, the procurement of juvenile and price rise of feeds (raw fishes only) become problems.

Therefore, the mass production of the artificial seedlings and the development of the assorted feed are expected.

year	Number of emergence company
2005	1
2006	3
2007	9
2008	11
2009	4

Source: marino-forum 21

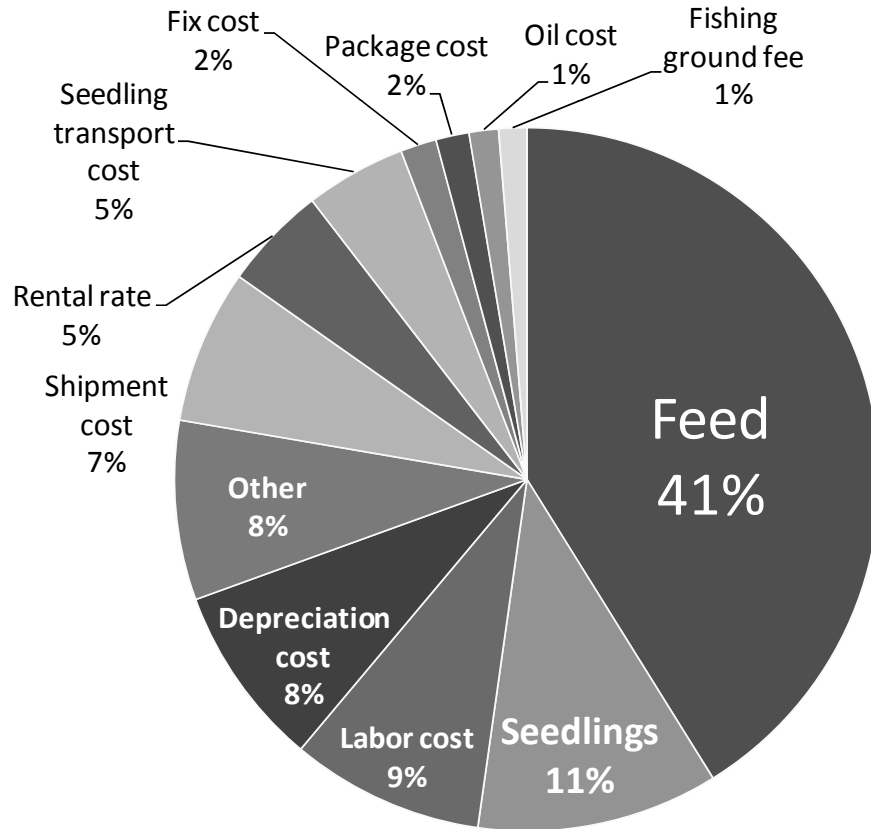


Cultured tuna production in Japan

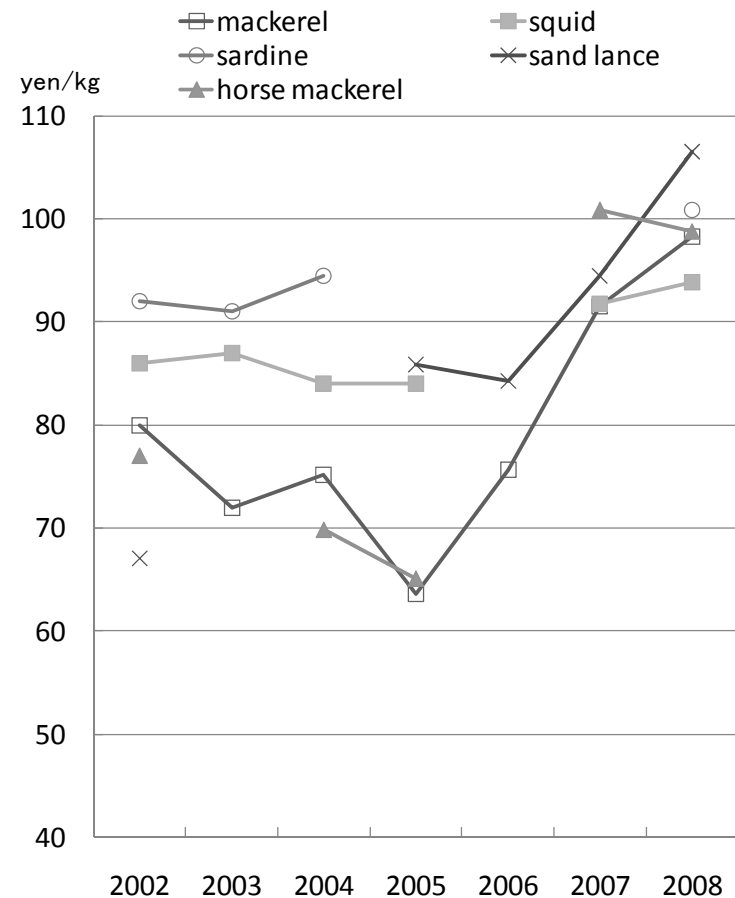
Source: Suisan Times and Minato Newspaper

Cultured tuna's production expenditure

The feed expense accounts for 40% of the total cost of products and the seedling cost (10%) and the operating labor cost follow it (as a case of Kinki University). The unit price of most fish species for feeds is rising. The price rise of feed pushes up the produce cost, damaging the profitability of aquaculture companies.



Expense composition ratio in 2008



Unit price of feeds

Summary

1. Quantity supplied: downward trend

◆Mediterranean sea:

19,000tons in 2008 → 10,500-11,000tons in 2009

◆Mexico: 1000-1500tons

◆Japan: 6,000tons in 2008→8,000-10,000tons in 2009

◆Australia: 8,000tons in 2008→8,000-9,000tons in 2009

2. Price trend :Lehman's fall !!

Top ends of Japan and Spain: 3,000-3,500yen/kg

→3,000yen/kg ?

Australia and Mexico: 2,000-2,500yen/kg→1,500yen/kg ?

3. Japanese aquaculture has global competitiveness and a promising type of domestically business in the medium and long-term. However, If the rise of the production expense continues, management turns worse.