

# Marketing Mission for BC Sea Urchin Products to Japan, November, 2003

## Mission members

Mike Featherstone - President of the Pacific Urchin Harvester's Association (PUHA)

Tim Joys - Director PUHA

Ken Ridgeway - Director PUHA

Dave McRae - Director PUHA

Herb Watson - Director PUHA

Dave Kensall - Research Director for the West Coast Green Urchin Ass'n

Juanita Rogers - DFO - North Coast Invertebrate Manager

Geoff Krause - Trade and Market Consultant

## Mission Summary

On Tuesday, November 4, the group started with an early morning visit to Tsukiji market to observe the product being offered through the uni auction (Figure 1) and to meet with representatives of the auction

houses. We checked to see what Canadian product was at the auction and monitored the action so we could get an idea of the prices being offered. It is worth mentioning that the quality of the BC product was poor and that the prices seemed to fit the value. It appears that only the C and D grade product from BC is put on the auction while all of the higher quality material is kept off the market where the prices are not subject to scrutiny. On Tuesday there was quite a bit of California product available which,

according to the people we met and spoke with at the auction, depressed prices a bit over the market as a whole simply because the California product is pretty much the price setting benchmark for the market when it is available. Some Japanese uni was sold that day at more than twice the California price, or ¥9,000 for a 200 g tray.

Following the auction, we continued touring the wholesale parts of the market, visiting booths on the main floor and enquiring after the prices of a uni products and their source. We met with a number of the vendors and discussed the trends in their business. One wholesaler had Canadian trays from the Forager which were sold directly to retail and food service customers. This product was also delivered to customers ordering from the wholesaler. This wholesaler was very satisfied with the quality of the product but did have concerns around the price.



**Figure 1:** Pre-auction uni hold room at Tsukiji.



**Figure 2:** BC RSU uni (¥650)

A number of the members had set up a meeting with a Mr. Hirogawa from Tohto Suisan Co. Ltd, a large processor of green urchins in Hokkaido. In the afternoon the group went to a large supermarket ItoYokado to see the retail side first hand. BC processors noted that this supermarket chain often carried uni from Canada. Some seafood prices are listed below. The level of prepared convenient packaging which could be used directly by the consumer was far above what one would see in Canada. There was a wide variety of pack sizes and varieties which are ready to use. Consumers can also custom order or pick up full meal bento boxes. There were various in store food demonstrations which included tuna sashimi and breaded fish.



**Figure 3:** Russian GSU uni (¥1,000)

Once the group finished touring the supermarket they returned to the hotel to complete preparations required for the Wednesday meeting at the Canadian embassy with various sea urchin product buyers and auctioneers.

The mission members also got another visit in at the auction prior to the meeting, an effort which we felt was well rewarded by the subsequent interest shown by the auction houses in BC urchin products. A summary of the meeting at the embassy is attached to the main report as a separate appendix.

Once the meeting at the embassy was complete the group spent the rest of the day exploring the many retail and food service outlets in the Tokyo area to develop a feel for the culture. On Thursday morning the group made one more visit to the Tsukiji market as a show of appreciation for their efforts in attending our meeting. We made some quick friends at Tsukiji and promised to keep in touch with them.



**Figure 4:** BC RSU uni (¥850)



**Figure 5:** California RSU uni (¥4,500)

## Price survey

BC uni in the Tokyo Ito Yokada store - a bit wet and dark but still sweet and very tasty. This uni is re-packed from the bulk tray onto the smaller trays in the store. A survey of prices includes:

Product	List Price	Unit Price	Comments
uni	980¥ for 85 g	1,152 ¥/100 g	BC red urchin uni
	698 ¥ for 40 g	1,745 ¥/100 g	BC red urchin uni
scallops	384 ¥ for 216 g	178 ¥/100 g	- scallops are very large, meat only
	377 ¥ for 212 g	178 ¥/100 g	- meat only
	380 ¥ for 214 g	178 ¥/100 g	- meat only
	393 ¥ for 221 g	178 ¥/100 g	- meat only
	388 ¥ for 218 g	178 ¥/100 g	- meat only
	398 ¥ for 170 g	234 ¥/100 g	- swimming size, meat + gills etc.
Prawns	348¥ / 100 g	348¥/100g	

Other retail prices for uni were obtained from a small store in Otaru. Price for uni (greens) were:

uni	5,800 ¥ for 250 g	2,320 ¥/100 g	green urchin uni- sale price
	6,980 ¥ for 250 g	2,792 ¥/100 g	green urchin uni- regular price
	3,800 ¥ for 250 g	1,520 ¥/100 g	red urchin uni - sale price
	4,800 ¥ for 250 g	1,920 ¥/100 g	red urchin uni - regular price
canned uni	1,300 ¥ for 190 g	684 ¥/100 g	
combination	880 ¥		Squid stuffed with uni
scallops	1,580 ¥ for 500 g	316 ¥/100 g	large scallops, meat only

After returning from the market and a quick breakfast the group headed for Sapporo, the capital centre of Hokkaido for an agenda arranged by Shinichi Tsujio, the Commercial Officer for the Trade Section of the Honorary Consulate of Canada in Sapporo. This agenda included a tour of the Sapporo Wholesale Seafood market, a meeting at a sea urchin processor by the New Chitose International Airport, a fully-modern salmon processing facility as well as a number of more informal meetings with local players in the local seafood import and processing industry.

On the subject of the modern salmon plant it is very likely worth noting that it had fully up-to-date HACCP, ISO9000 and I believe ISO 14000 certifications. The various processing activities, e.g. filleting, brining, rinsing, smoking, cooling, packaging etc, were all conducted in their own separate rooms whereby full control over the product flow could be maintained with absolutely zero possibility of cross-contamination. All processing areas were 'clean areas', accessible only through air-showers with alcohol-based hand disinfection facilities. There was a lot of experience gained through the tour as many of us had not seen this sort of seafood processing facility before.

At the sea urchin plant the crew was processing Russian greens. The product freshness looked questionable and the recoveries were poor (only 5%). The cracking, rinsing and packing were not so different than one would see in Canada.

The trip was highly successful. We collected significant amounts of information that would have been otherwise very difficult if not impossible to collect, met many new contacts who provided many insights into the Japanese market as well as considerable advice and encouragement for broadening our market appeal in Japan. The supply situation for sea urchin products is quite likely to see a dramatic reversal over the next few years that should strengthen Canada's position as a supplier of high quality sea urchin products to Japan.