

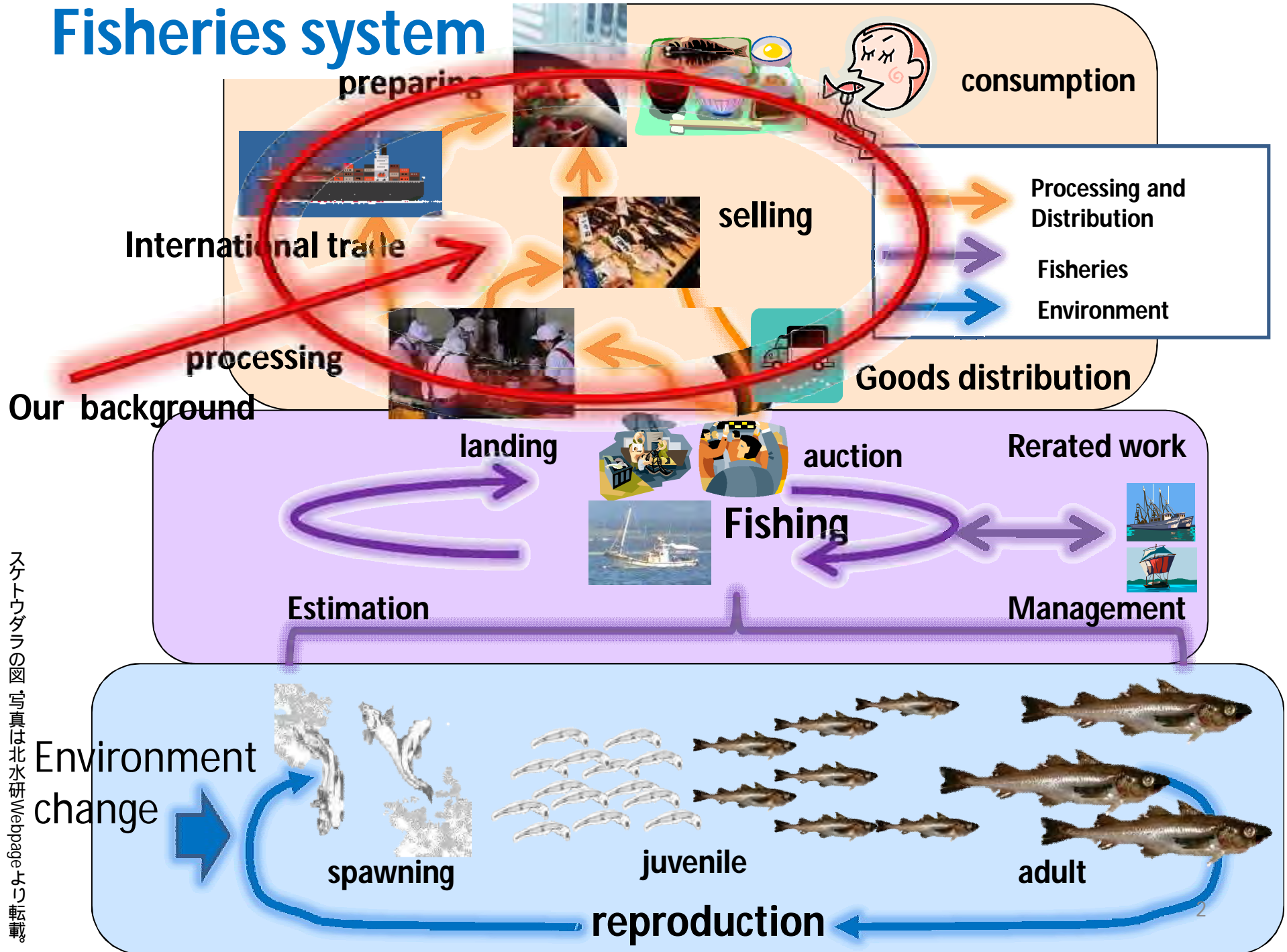
Market and distribution of Walleye pollock

Masamichi Kawano
(Maruha-Nichiro seafood, Inc)

Masahito Hirota
(FRA Japan)

16.oct.2012, Hiroshima

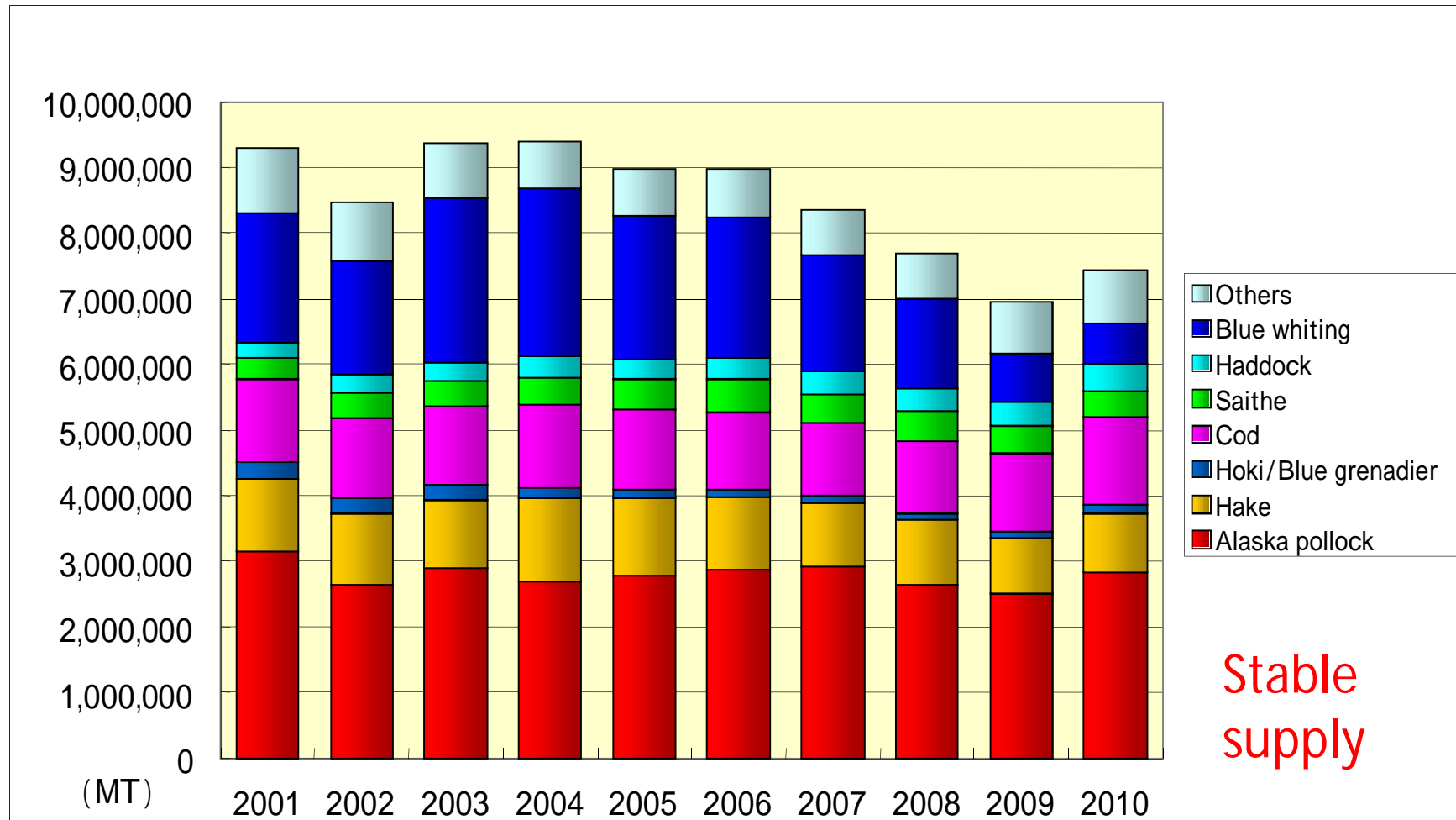
Fisheries system



ステートウダラの図写真は北水研Webpageより転載。

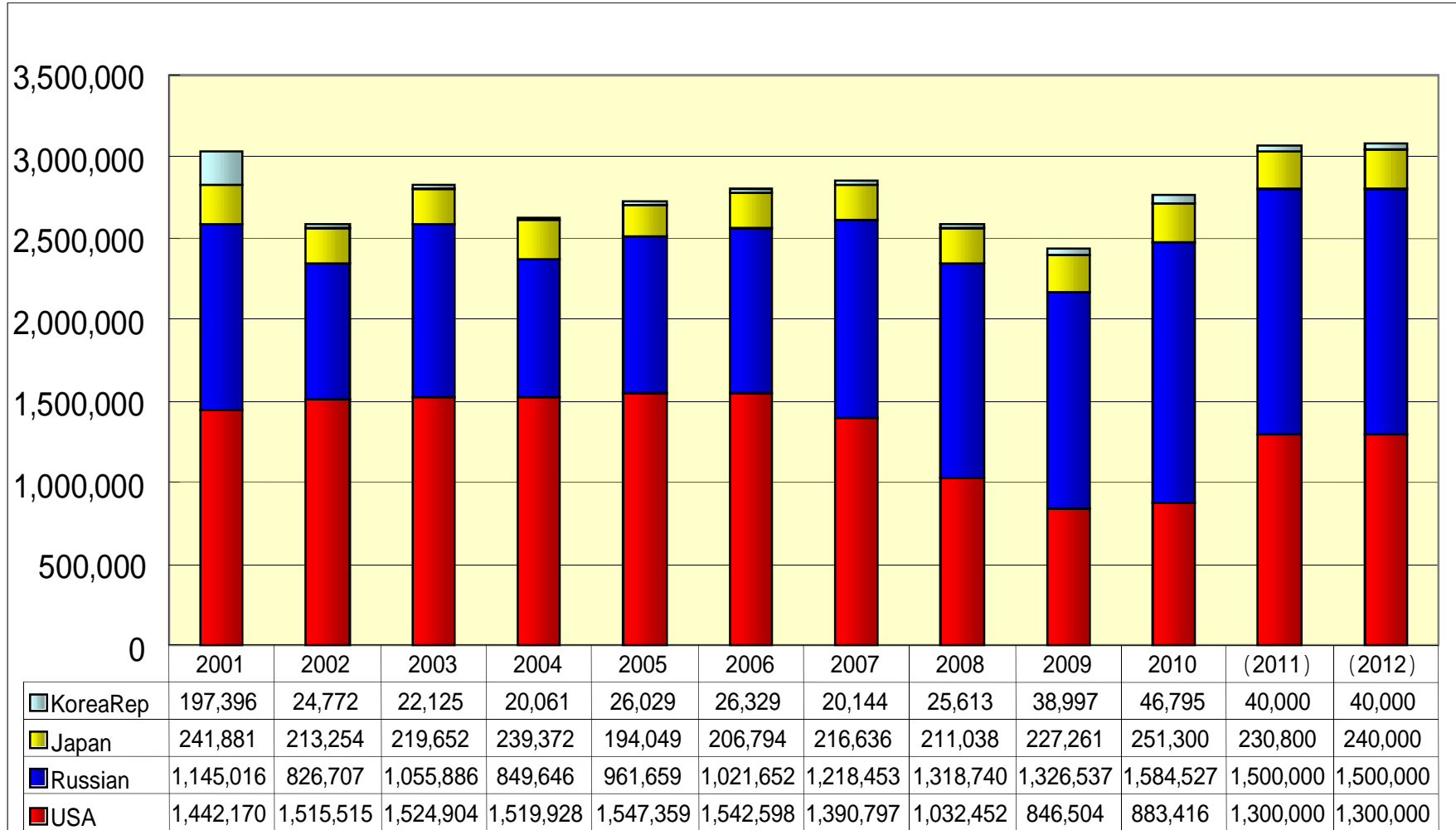
The trend of supply

World Fishery Production of Captured whitefish by Fish species



source : FAO yearbook Fishery and Aquaculture Statistics 2010

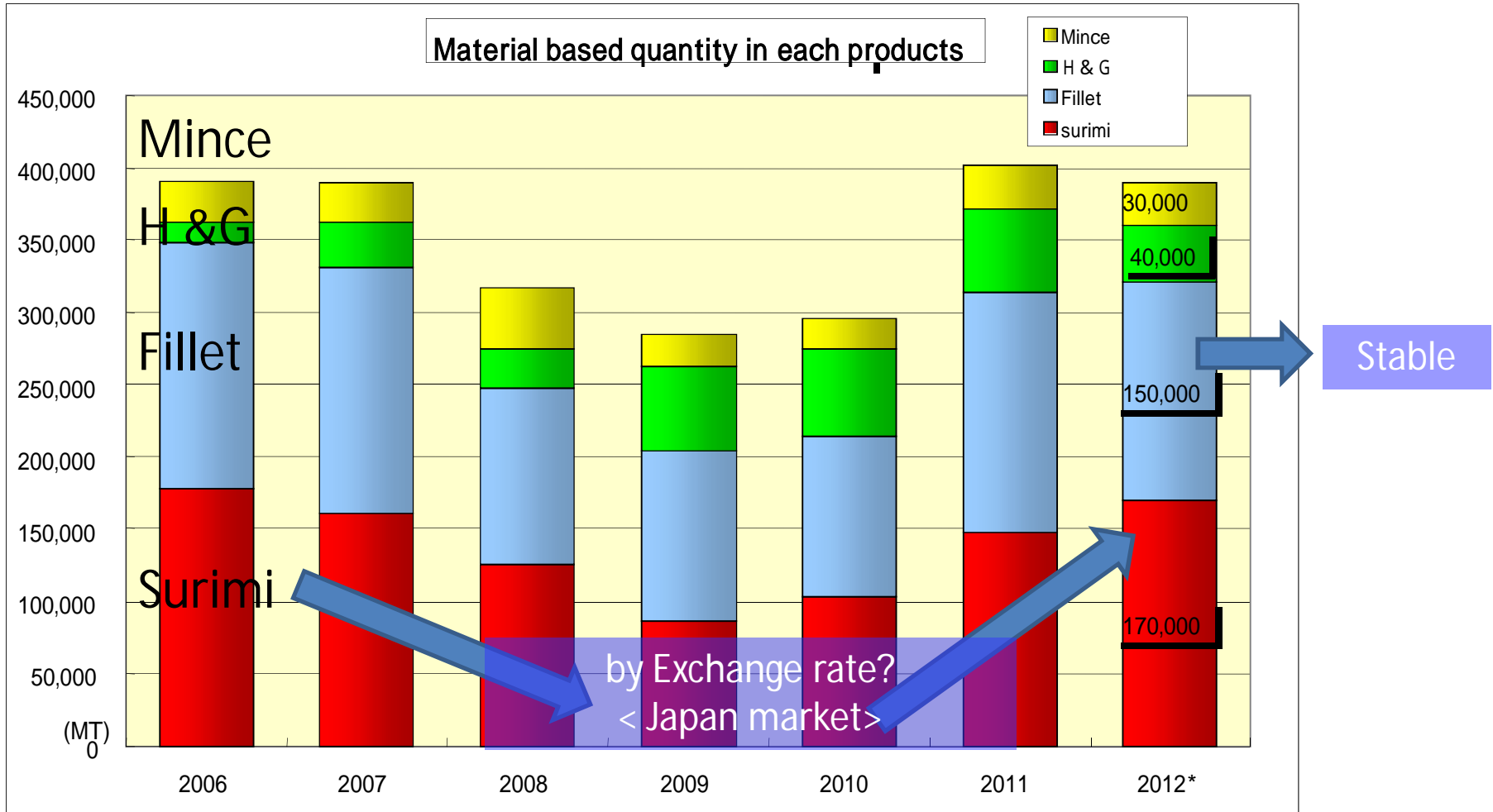
Supply weight of Alaska pollock



出所 : FAO yearbook Fishery and Aquaculture Statistics 2010

2011 and 2012 data are estimation by Maruha Nichiro

Product weight of Alaska pollock



source : NMFS statistic date
 • 2012 data is estimation by Maruha Nichiro



http://www.tridentseafoods.jp/products/other_surimi.html
(2012.8.23)

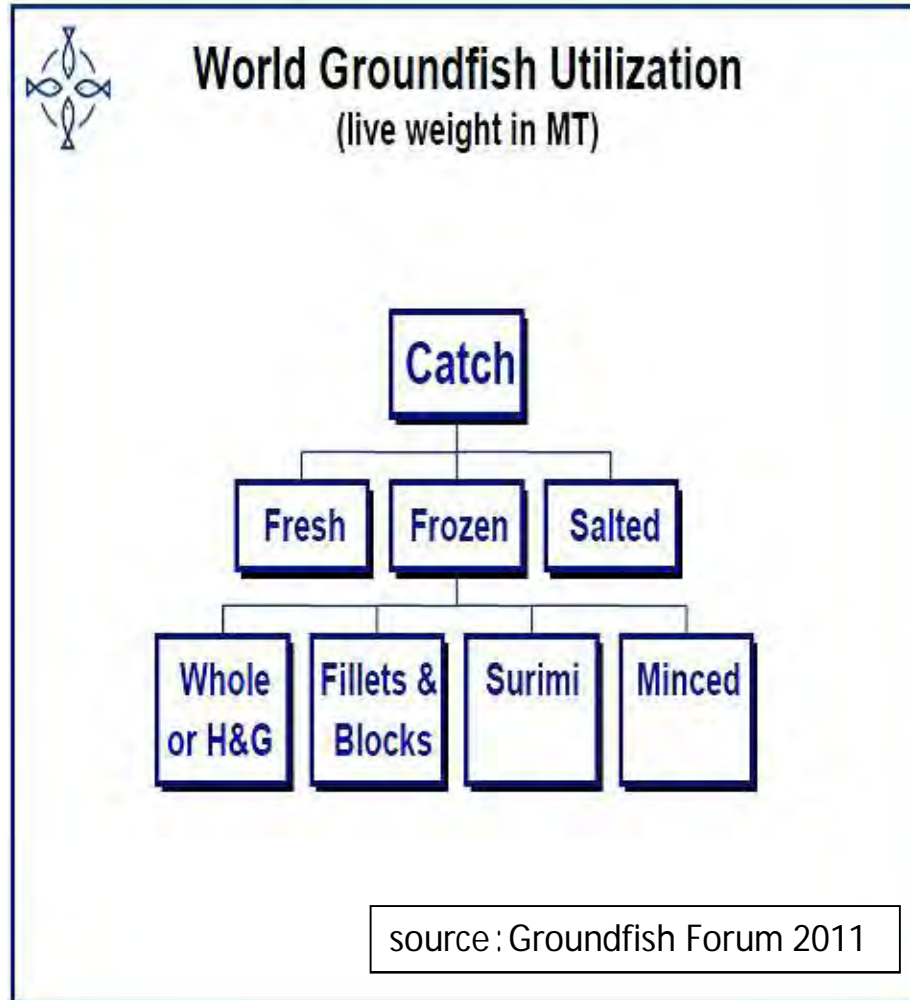


<http://www.mmart.co.jp/search/cate.cgi?type=buybuyc&i d=miyabi&num=207> (2012.8.23)



Fillet supply

Main whitefish products



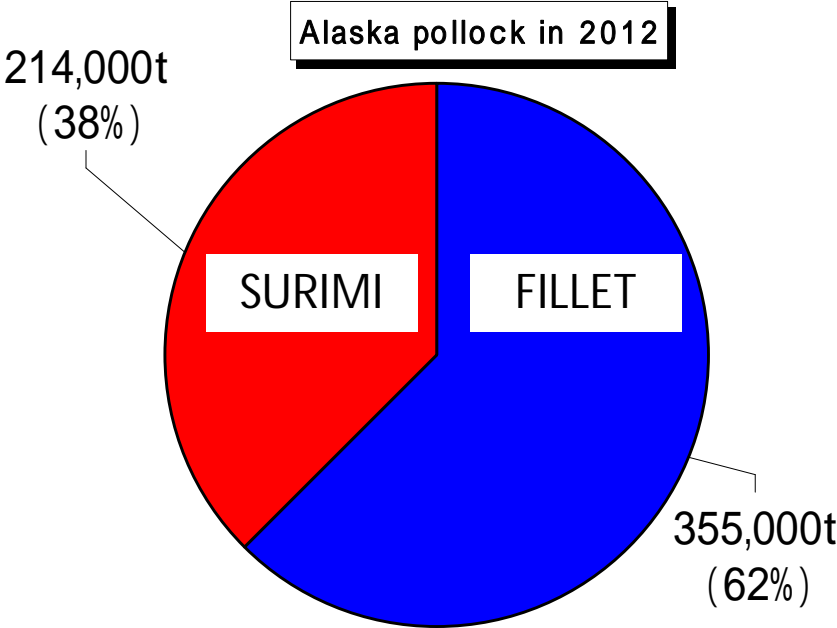
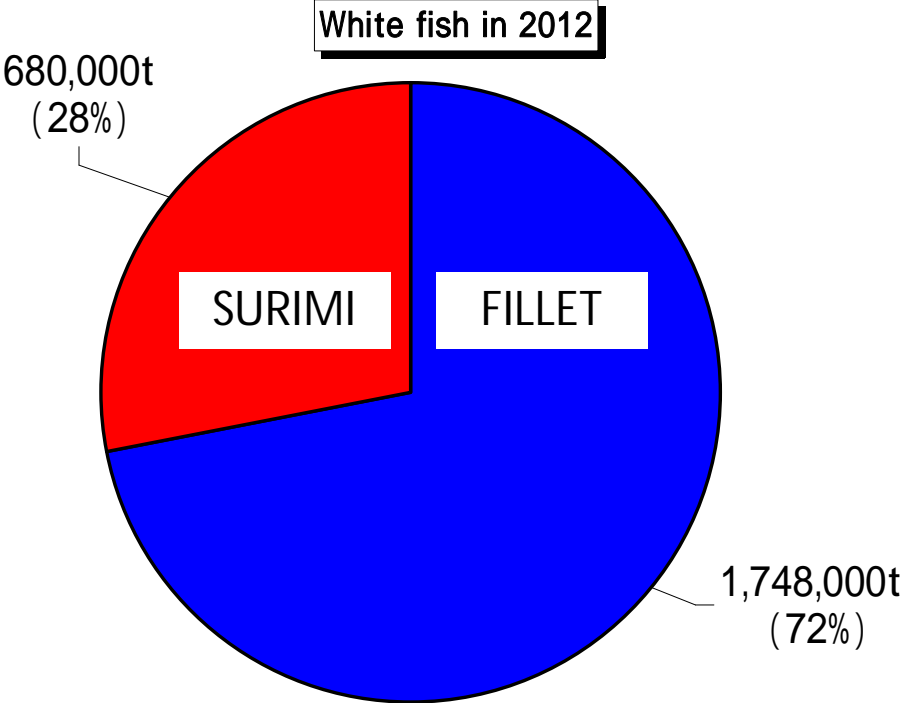
[Main products category]

- Round
- H&G (Headed and Gutted)
- Fillet
- Fillet brock
- Mince
- Surimi

A many of the H&G products are re-frozen as twice frozen products, and it s supplied to the world market

Market scale of Surimi and Fillet

Fillet market is much larger than Surimi



Especially, Brazil and African fish market are rapidly growing, and this stream become more strong the Alaska pollock consumption has begun already (but in Africa, using round or H&G)

Fillet products weight by species

Products weight in 2010

source : Groundfish Forum 2011

	Blocks	Fillet (IQF)	Total Fillets
Pangasius*	-	659,300	659,300
Tilapia**	-	151,000	151,000
Haddock	21,000	47,000	68,000
Saithe	12,000	58,000	70,000
Cod (Atlantic and Pacific)	42,000	159,000	201,000
Hoki	25,000	31,000	56,000
Hake	32,000	165,000	197,000
Alaska pollock	302,000	53,000	355,000
Total	434,000	1,314,000	1,748,000

* Pangasius means the amount of Viet Nam exports

** Tilapia is only imports in USA

Fillet product weight - Alaska Pollock



Alaska pollock – total blocks and fillets

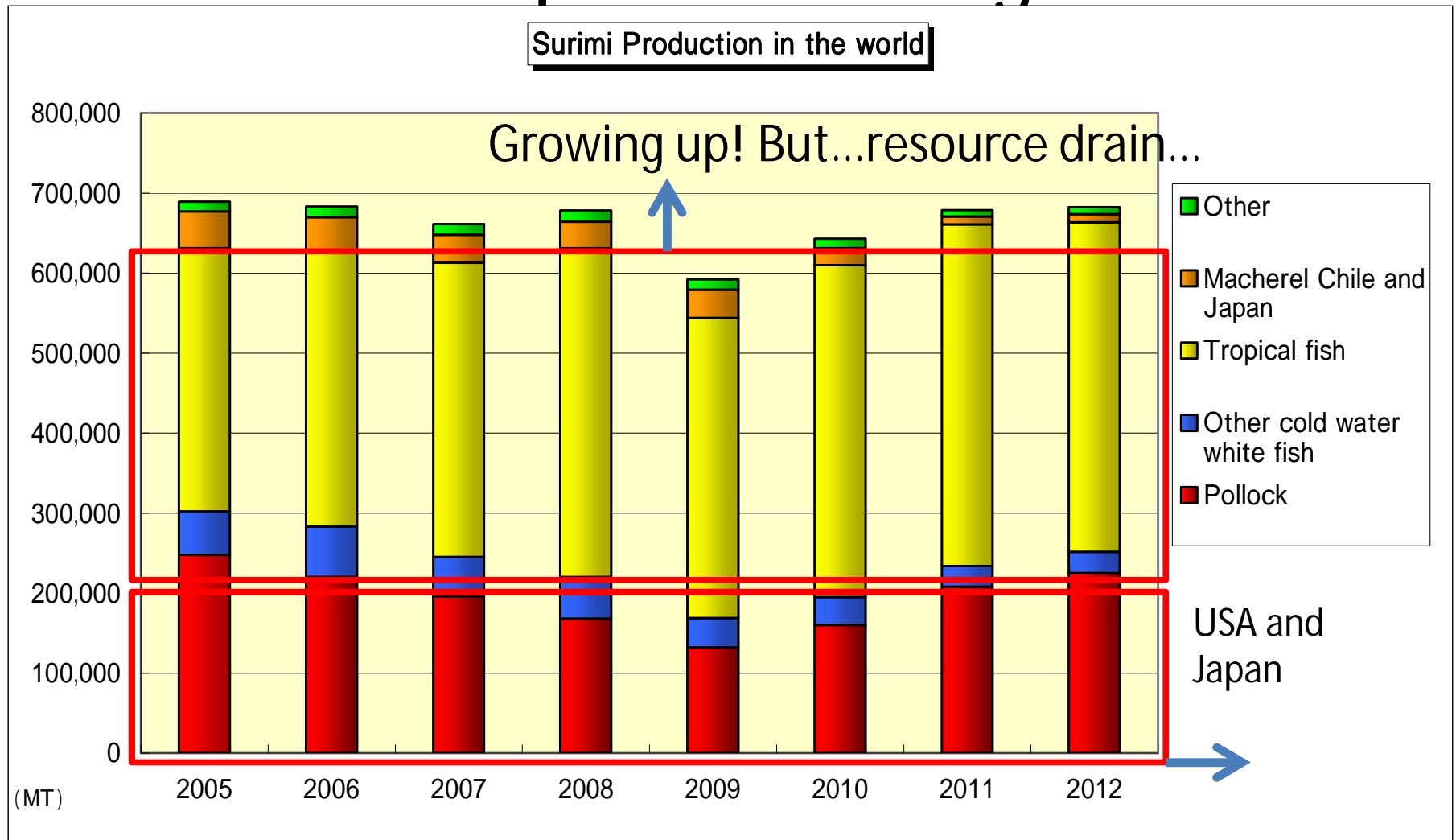
Product weight 2010 (2009)

	Blocks MT	Fillets MT
USA single frozen	105,000 (110)	6,000 (6)
Russia single frozen	25,000 (29)	1,000 (1)
Total single frozen	130,000 (139)	7,000 (7)
Double frozen est.	172,000 (184)	46,000 (49)
Total pollock	302,000 (323)	53,000 (56)

source : Ground fish Forum 2011

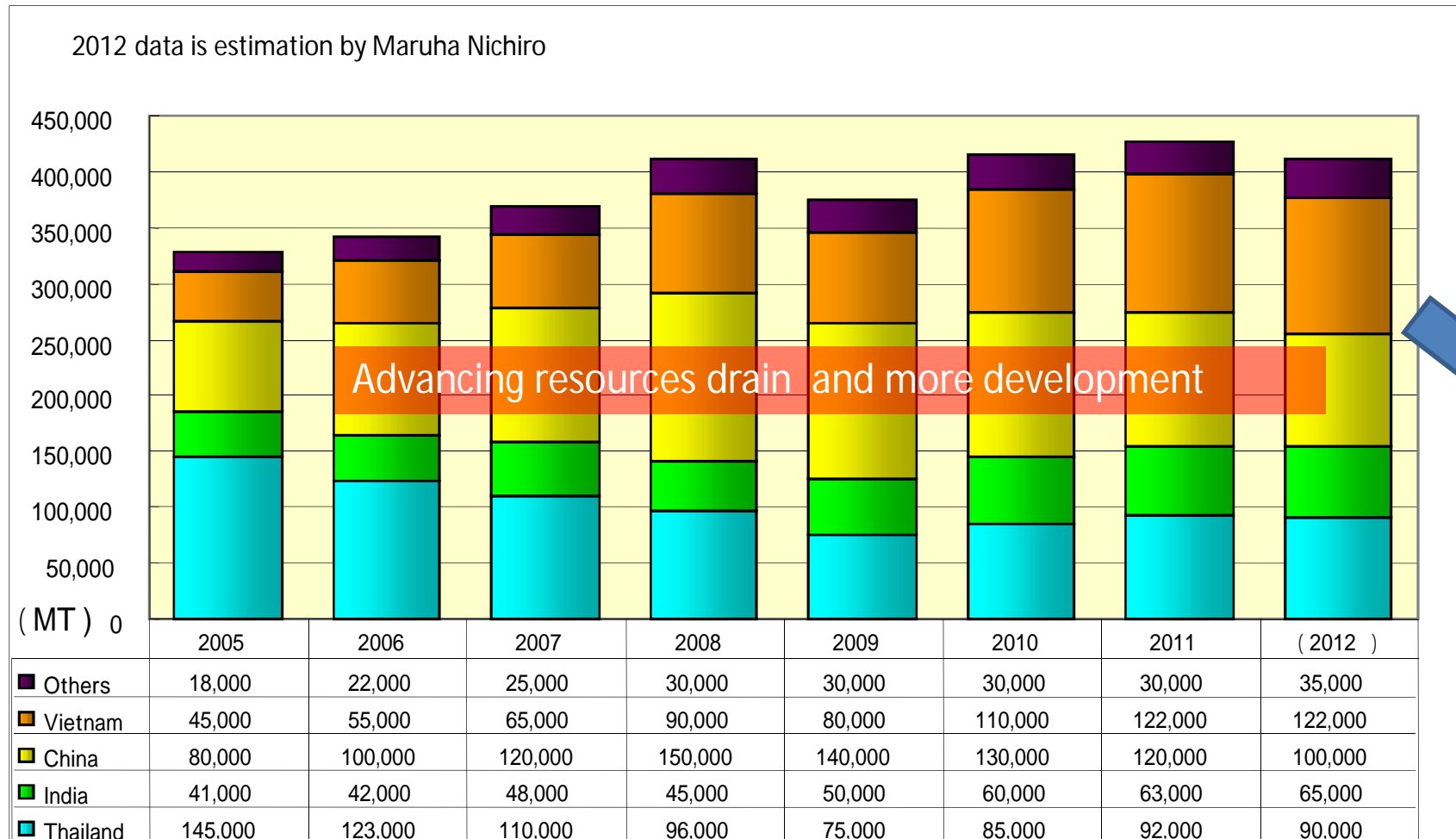
Surimi supply

Surimi product weight



source : from SURIMI FORUM 2011
· 2012 data is estimation by Maruha Nichiro

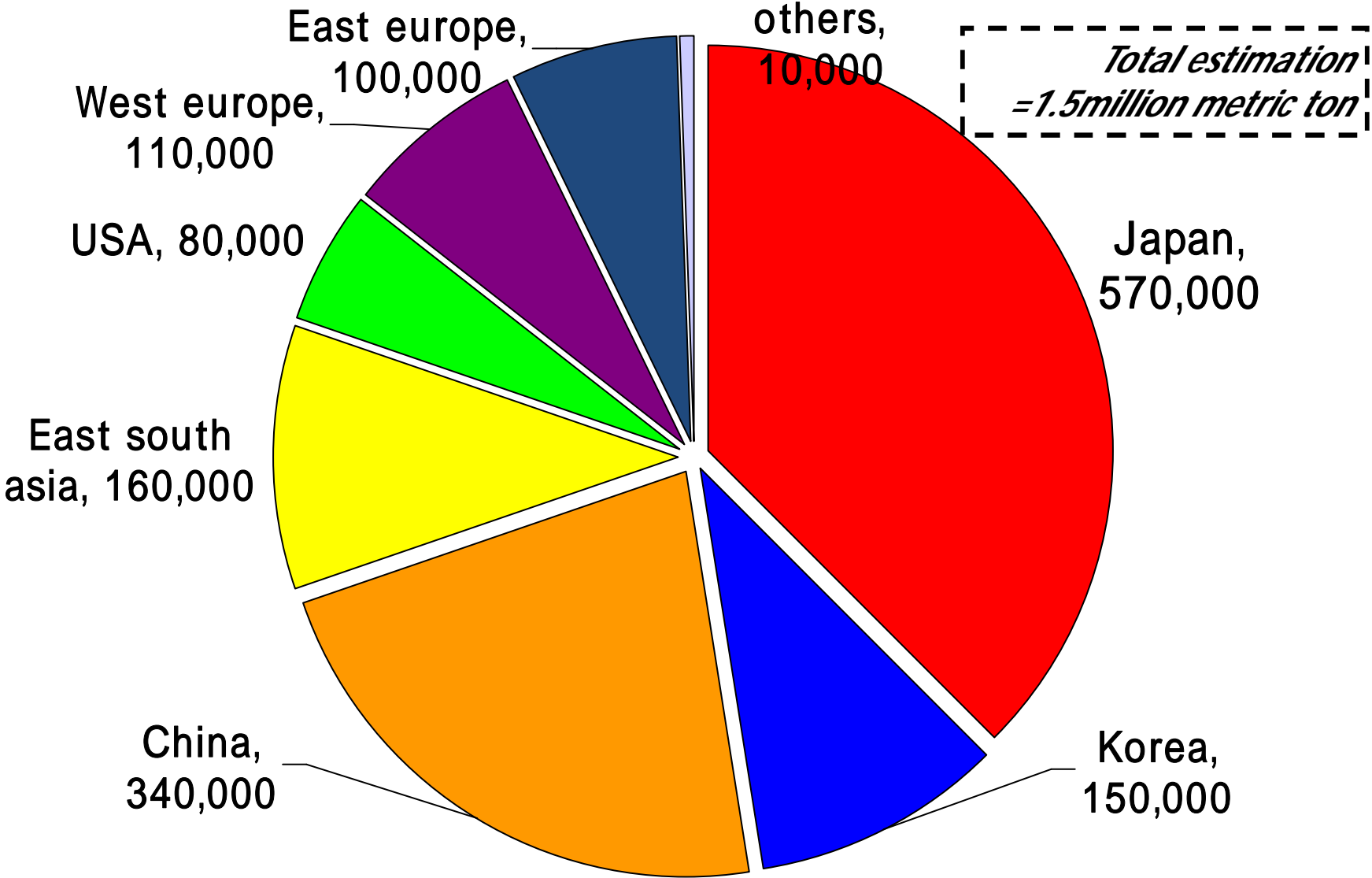
Surimi products weight change in South East Asia



source : SURIMI FORUM 2011

Fish paste

Fish paste products weight in main consumption countries



USA -stable market-

Product weight 80,000 metric tons

Items · · · SURIMI (Kani-kama it means imitation crab fish pasta)

Main material · · · walleye pollock, Hake and so on (it used the middle or under glade)



Korea –stable market-

Products weight 150,000 metric tons

Items · · · Surimi(Kani-kama, imitation crab), flied fish pasta, grilled fish paste with bamboo stick (Chikuwa), sausage and so on

Main material · · · Hairtail, the other fish by East south Asia (low glade), Alaska Pollock



China –explosive growing market-

Product weight = 340,000metric tons

Items · · · Surimi (imitation crab), grilled fish paste with bamboo, Fish ball, sausage and so on

Main material · · · the other fish by Asian area (low grade)、Alaska pollock



East South Asia –historical, traditional and

growing up market by population increase and economic growing

Product weight 160,000 metric tons

Items · · · Surimi, Flied fish pasta, grilled fish paste with bamboo stick, fish ball

Main material · · · golden threadfin bream, hairtail, lizardfish



Europe –stable surimi market-

Production weight 110,000 metric tons

Items · · · Surimi (imitation crab, Kani-kama)

Main material · · · Alaska pollack, Hake, golden threadfin bream



Russia ~ East Europe – Surimi market

Product weight 100,000 m.t

Items · · · Surimi (crab, kanikama), sausage

Main material · · · Golden threadfin bream, Alaska pollock
Hake, and so on



Thank you