Characteristics of Japanese Wholesale Auction Markets for Fresh Fruits and Vegetables

Raymond A. Jussaume, Jr., Nobuhiro Suzuki and Dean H. Judson[1)]

1. Introduction

The average size of Japanese farms is about 1/200 that of those in the U. S. A. Production costs for Japanese farmers are thus much higher than those of American farmers, but many fresh commodities produced in Japan are nonetheless very competitive with imports because of their exceptional quality. One of the primary strategies which many Japanese farmers employ to compete in the Japanese marketplace is to take advantage of the willingness of Japanese consumers to pay more for produce which the latter consider to be of superior quality.

The exceptional freshness and variety of Japanese produce is attributable to the highly competitive structure of domestic production and distribution, as well as to the high level of concern for food quality which Japanese consumers have (Jussaume, 1989). This highly competitive marketing system

1) Raymond A. Jussaume, Jr., is an assistant professor, Department of Rural Sociology, Washington State University, and Visiting Foreign Specialist, National Research Institute of Agricultural Economics. Dean H. Judson is a Ph. D. candidate, Department of Sociology, Washington State University.

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has evolved and persisted because of the existence of a large number of domestic producers, middlemen and retailers. A focal point of this system is the nationwide network of public wholesale auction markets for fresh produce. Since prices for fresh fruits and vegetables vary a great deal and are established at an auction, each Japanese producer must improve the quality of his commodity to the maximum in order to appeal to consumers' desire for high quality products. Only farmers who can produce superior goods obtan the high prices necessary to survive in the high cost environment of Japanese agriculture. In other words, the Japanese domestic market for fruits and vegetables is characterized as much, if not more, by producer rivalry over the quality attributes of commodities, such as improved product taste and safety, than by attempts to lower production costs. Indeed, the stress on improving quality rather than lowering costs dominates the entire Japanese marketing system (Pauli, 1985). To put it another way, value perception can be defined as perceived benefits divided by price (Pierson, 1989), where perceived benefits include convenience, quality, variety, excitement, nutrition, safety and health. The perceived benefits of Japanese fresh produce can be said to be high while price is also high, so that the value perception of this produce is not often low when compared with imported fresh produce.

In Japan, nearly 90 percent of domestic fresh produce and about 40 percent of imported fresh produce are distributed through the 2, 719 wholesale markets which exist throughout Japan. Since the determination of price relative to quality occurs within the wholesale auction markets, understanding the inner workings of these markets is essential for developing a more astute awareness of the Japanese marketing system for fresh produce.

The objective of this report is to understand the way in which most fresh produce is marketed in Japan by describing how the auction markets work and how market participants perceive produce quality. The report begins with an historical review of the evolution of the wholesale market system in Japan into its current structure. This is followed by a description of the contemporary structure of one of these markets, which incorporates an analysis of data collected during a survey of the Kanda wholesale auction market in Tokyo during the spring of 1989. Until May of 1989, when most of the functions of the Kanda market were moved to the new marketplace at Ota, the Kanda market was the primary auction market for fresh fruits and vegetables in Tokyo and arguably all of Japan. The social relationships and market processes observed in the Kanda market now dominate market transactions in Ota.

2. History of the Wholesale markets

The Japanese wholesale markets for fresh produce are governed under the Wholesale Market Law, which was enacted by the Japanese Diet in 1971. This law replaced the Central Wholesale Market Law of 1923, which was the legal origin of the present day auction market system. Under the original law, ownership of central wholesale markets was restricted to prefectural governments and transactions in the marketplace were governed by four main principles; 1) that commodities were to be sold at auction, 2) that these sales would take place on consignment, 3) that auction houses could not refuse to put up any received good for auction, and 4) that all sales had to be spot transactions. When the original law was replaced by the new law in 1971, escape clauses which allowed participants more flexibility in following these guidelines were included, although the basic principles remained unchanged.

The reason why the word "Central" was eliminated in the title of the revised law is that the new law covers not only the large, Central Wholesale Markets but also applies to the smaller, Regional Wholesale Markets which are scattered throughout the country. A Central Wholesale Market is defined as a market supervised by a prefectural government or the government of a city whose population exceeds 200, 000 people. These markets are established under the authority of the Minister of Agriculture. A Regional Wholesale Market is defined as a market which is permitted under the authority of the director general of a prefectural government and whose floor size exceeds $330m^2$.

One of the key provisions of the Wholesale Market Law is that produce should be sold at public auction. At the time when the original Central Wholesale Market Law was enacted, high inflation brought on by World War I and the increased flow of migrants from rural to urban areas was at a peak. At this time there was widespread suspicion amongst the general populace that many merchants dealing in daily necessities were taking advantage of the difficult times to pad their profit margins. Public indignation exploded in the nationwide rice riots of 1918. As a result of this political turmoil, the Japanese government decided that the prices of daily necessities like foods should be formed fairly and in public view and so established the Central Wholesale Market Law.

It is interesting to note that at that time wholesale merchants supported the establishment of the new system because they hoped the new Law would help them reestablish their monopolistic power over fresh produce transactions which had been declining due to the intensification of competition in fresh produce marketing (Shokuhin Jyukyu Center, 1979; Yoshida, 1978). The development of new distribution channels to accommodate new production areas, improvement in transportation technology and an increase in the population of major urban centers had led to increased competition for these wholesalers. Historically, established wholesale merchants had been able to prevent newcomers from entering their closed marketing territory through the use of monopolistic rights granted to them under the authorization of the Edo Shogunate during Japan's feudal period. Business taxes and bribes from these merchants were an important source of revenue for the Edo Shogunate. These privileges were lost with the abolition of the Shogunate in the 19th Century. The dream of these wholesalers to reestablish their monopoly was partly realized because they were able to enter into new markets as authorized auction houses, but their merchant activities were severely restricted by the Law. They were turned from merchant houses which bought and sold commodities into mere auction machines which could only sell produce on commission.

The most controversial issue which had to be resolved when the new system was first established was how many auction houses should be permitted to operate in each market. It was generally agreed upon that a large number of auction houses in each marketplace would lead to too much competition and be inefficient. However, some people supported the concept of one auction house per market while others, who believed this would be too monopolistic, favored the idea of having a handful of auction houses in each market. The debate was resolved by allowing each market to decide the issue for itself, based upon the input of the old, established merchant houses in each locale. Thus, the Kyoto market, which was the first wholesale market created under the Central Wholesale Market Law, as well as the markets in Yokohama, Osaka and Kobe, each adopted one auction house in their wholesale markets. This shows how tired of competition the old merchant houses were. The major exceptions to the one market one auction house rule were the markets in the Tokyo area. As a result of the anti-monopoly policies of the American post-war occupation, all auction markets in Japan now have a minimum of two auction houses each (Yoshida, 1978).

This was the basic origin of the Wholesale Auction Market System in Japan. It may be said that the Japanese public auction market system reflects the characteristics of Japanese society in that in the market no one person can decide things by himself and must seek the judgement and approval of others. Everybody can feel "at home" because everybody operates within an established and well-regulated social framework (Toda, 1989). The wholesale auction market is particularly effective for fresh produce because of the necessity to sell many kinds of perishable and non-standardized commodities from numerous small farmers to many retailers speedily and efficiently. The fact that there are still a larger number of producers, middlemen and retailers in Japan than in many other industrialized countries continues to make auction transactions a suitable form of marketing in that country.

The Kanda market in Tokyo began when local farmers gathered to sell their fresh produce at that location around the year 1600. In 1714, the Kanda market was given a special status when it was authorized to be the only supplier of fresh produce for citizens of the Edo Bakufu. Other markets in what has become the Tokyo area could only sell fresh produce with the permission of the Kanda market (Shokuhin Jukyu Kenkyu Center, 1979).

3. The Contemporary Auction Market

There are currently 91 Central Wholesale Markets, 1, 673 Regional Wholesale Markets, and 955 other smaller auction markets throughout Japan. As it would be difficult in a brief report to examine the variety of structures in wholesale markets which can be found in Japan, this report will focus on the Kanda market as an example of a Japanese wholesale auction market. For decades, Kanda was the single largest wholesale market for fresh produce in Japan. Most of its functions were moved to a new location south of central Tokyo at Ota in May of 1989 because the Kanda market had become too small for its needs. At the time data for this study were collected, the new market had not yet opened, and so the Kanda market was selected as the research site because of its contemporary as well as historical importance.

The Tokyo metropolitan government owns the Kanda market. At the time of the study, there were three authorized wholesale auction houses which operated within the market, employing about three hundred individual auctioneers. The new Ota market began operations with 376 auctioneers working for six auction houses. Auctioneers must pass an examination administered by the market owner in order to be able to work in that market.

Participating in the daily auctions as buyers in the new Ota market are 208 wholesale and 2, 213 authorized retail buyers. In the Osaka area, only authorized wholesalers are permitted to make bids at auction, but this is not the case in the Tokyo region. Tokyo area retailers won the right to participate in the actual bidding after World War II, when small retailers organized to press for their rights to join the auction. In the Kanda market, there were 191 wholesale firms and 1,783 authorized retail buyers, including some supermarkets and other large buyers such as school lunch companies. Although supermarkets have the right to bid at auction, they rarely exercise this right because they have discovered that it is cheaper to make their purchases through wholesalers.

Transactions in the wholesale market are governed by the Wholesale Market Law. The main requirement of the Law is that all commodities must be consigned to auction houses and must be sold at auction. The prices have to be announced publicly and are reported in the daily press much like stock market quotations in order to ensure a fair and open market. However, several exceptions to these requirements are now allowed under the provisions of the new Law.

First, it is not necessary to have an auction in cases where the commodity can be standardized or preserved because buyers can purchase such commodities without having to check on the appearance and quality of each sample at an auction. The second exception is the *YOYAKUAITAI* (literally, "ordering by request") system, which is a direct transaction between producers and retailers at a fixed price for an agreed upon time period, usually about 3 months. This system was first introduced in 1971. However, it is used infrequently because it is too risky for buyers and sellers to get locked into a single price for that long a period of time as auction prices often fluctuate widely with corresponding losses for one of the parties.

The third exception is *SAKIDORI* (literally, "taking before hand"). *SAKIDORI* is a form of buying which was implemented for the benefit of supermarkets and distant local city markets. Given that auctions take place between 6:00 and 8:00 in the morning and as supermarkets generally open their doors at 10:00 a. m., supermarkets find it difficult to purchase and transport produce from the marketplace to their stores in the short time period available. In addition, commodity shipments out of producing areas have increased and shippers find it easier to send entire shipments to a single marketplace like the Kanda market, instead of dividing up the shipment and sending it to different local wholesale markets in a city. Once again, the auction time at Central Wholesale Markets is too late to meet the needs of wholesalers in other local markets who must transport the produce from a Central Market to their stalls at their home market. Thus, a system whereby large retailers and wholesalers from other markets can obtain commodities from wholesalers in markets like Kanda after they arrived during the night, but before the auction took place, was needed.

In *SAKIDORI*, wholesalers make a promise with an auction house to buy a section of a particular quality and size lot(s) from a shipment of produce from a producing region. The price is set at the highest price received for produce from that lot at that morning's auction. *SAKIDORI* is restricted to 30 percent of any given lot, although market participants informally admit that the actual percentage is somewhat higher. The rationale for the restrictions on *SAKIDORI* is that if there were no limit, small retailers would find themselves excluded from access to particular lots. However, these restrictions are being flaunted because supermarkets are becoming very important customers for wholesale agent companies. About 60 percent of fresh produce sold in the Kanda market was said to be ending up in supermarkets.

Moreover, as the best of a given lot is often taken out by *SAKIDORI*, the prices set at auction may be somewhat lower than they would be otherwise. This means that supermarkets can buy high grade goods at a comparatively low price and small retailers have limited access to the best produce. On the other hand, some people contend that the prices set at auction may be higher than they would be otherwise becanse the quantity left after *SAKIDORI* is too small to meet the demand for that commodity. If this is the case, small retailers have limited access to the best produce and must buy comparatively low grade goods at a comparatively high price.

The share of commodities actually being sold at the time of the auction is thus getting smaller. In the Kanda market, the share was said to be about 50 percent. The remaining 50 percent was sold by *YOYAKUAITAI*, *SAKIDORI* and residual sales after each auction. Residuals are those commodities for which no bid is made and are offered by auction houses after the auction to buyers at low prices. Recently, the number of cases of commodities remaining unsold, even after an attempt is made to sell them as residuals, has been increasing. These items are disposed of with farmers bearing the loss, since growers maintain ownership of the commodity until it is actually purchased by a wholesaler or retailer. According to Kanda market authorities, the growth in the number of such cases reflects the saturation of food demand in Japan as well as increasing consumer concerns about food quality and safety.

Completely pure price formation through auctioning has thus become difficult as producers' shipments have gotten bigger, producers' organizations have become stronger, and as the power of supermarkets has increased. Regional markets are now finding it difficult to sell at prices lower than Central Wholesale Market prices because producers' cooperatives will stop shipping to regional and local markets if the latter's price is constantly below that of the Central Wholesale Market price. For example, in one regional wholesale market in the Tokyo area, the ratio of produce sold at auction was estimated to be only 20 percent because many goods were forwarded to wholesalers in this market from Kanda wholesalers.

Another trend affecting the viability of auctions is the aforementioned problem with residuals. The saturation of the market for fresh produce in Japan has put buyers into an advantageous position. When poor quality produce arrives at a market, auctioneers sometimes don't even bother with an auction and simply take whatever initial offer they can get. Yet another problem arises in the case of commodities where seasonal production is dominated by a single domestic producing region. In cases where 80 to 90 percent of the supply is controlled by a single region, the producers' cooperative of that region can control the supply of produce coming to the market and can thus drive up prices. All of these conditions have led to increased *SAKIDORI* sales and have dampened the role of the auction in determining market prices.

Nonetheless, the existence of the auction does contribute to daily price fluctuations in fresh produce. To foreign observers, these price fluctuations may appear to be inefficient because they add uncertainty to future business planning. Some may wonder why Japanese producers and retailers continue to use wholesale auction markets even though it means they are subject to this kind of price instability. Part of the answer lies in the fact that making purchases through the wholesale market is an easy and reliable way to do business. In the mid-1960s, in response to growing public sentiment that the complicated distribution system for fresh produce was a cause of high food prices, producers began direct transactions with supermarkets. However, this system proved to be inconvenient for both sides.

The first problem with direct sales is that payments from supermarkets to producers take too long. It takes over 20 days for farmers to receive their payments if they sell directly to supermarkets, while it takes only about 4 days if they sell through wholesale markets. Payments through wholesale auction markets are not only speedy, but also safe and reliable because the wholesale market is a public organization. Moreover, supermarkets' requests to farmers are too specific when compared to the wide range of quality which farmers produce. Whereas wholesale markets can not refuse to auction any commodity from any farmer, supermarkets often request a large quantity of a specific quality, size or grade and will refuse to buy other grades or sizes. Supermarkets also have a tendency to suddenly change or cancel their contracts if they can find a better supplier. Therefore, farmers have decided that selling through wholesale markets is in their best interest even though a commission fee is charged.

For supermarkets, the advantage of buying through auction markets is that they do not have to train specialized buyers in order to buy commodities directly from farmers. Using wholesalers is cheaper than the cost of training their own buyers. Moreover, in the Tokyo area, as well as other large cities, supermarkets find it expensive to build their own warehouses due to extremely high land prices. As a result, supermarkets have also found it to be in their best interest to utilize wholesale markets. In the example of one big Japanese supermarket chain, it is said that 80 percent of the domestic fresh produce that firm retails is bought through auction market wholesalers.

As mentioned previously, the second restriction of the Law is that auction houses must not buy or sell commodities. They can only receive a commission fee for the commodities they auction. The commission fee is fixed at 8.5 percent of the sale price in vegetables and 7.0 percent in fruits. However, there are exceptions to this restriction as well. First, those commodities not sold at auction are obviously exempt. Second, those commodities which are in short supply can be sought out and purchased by auction houses in order to satisfy retailers' requests. This exception also applies to most imported produce, which is not sold at auction because the prices for imported commodities have already been established at the time the importer signs a contract with an overseas supplier.

Wholesalers in the auction markets can also purchase imported produce. According to the Law, wholesalers must not buy commodities from sellers other than auction houses, but when it is difficult for them to buy a specific commodity from an auction house, they are permitted to buy from other sellers. Therefore, under certain circumstances they may deal directly with produce importers. In this case, they must pay a rental fee to the market owner, i.e. the supervising government authority, because they use the auction marketplace as a storehouse for their imported goods. This fee is calculated upon the total value of imported produce sold by the wholesaler, including those goods which are transported directly from the port of entry to supermarkets. The fee is fixed at 0.25 percent of total value sold.

Approximately 40 percent of all imported commodities are thought to be sold through wholesale markets. Of course, the percentage differs by commodity. For example, about 50 percent of imported sweet cherries were distributed through wholesale auction markets in 1988, although it was about 60 percent in the early 1980s (Ministry of Agriculture, Forestry and Fisheries, 1989). Market wholesalers who deal in imported fresh produce, especially those who deal in fruits, usually specialize in imports only. This is because there are many varieties of imported fruits, some of them items which are not produced domestically. In addition, it takes many hours to re-pack imported produce in order to remove bruised or spoiled items and to downsize the packaging. Few imported fruits are sold at auction, although in the first years of banana and lemon imports, these commodities were sold at auction because high prices were realizable due to the strong demand for them in those days (Mori, 1982).

There are four basic distribution channels utilized for the other 60 percent of produce imported into Japan. The first is sales from importers to supermarkets. The second is from the associated trading companies of auction houses to supermarkets. The third is from importers to supermarkets through wholesalers with the commodity travelling directly from the port of entry to the buyer. The fourth is from foreign exporters to supermarkets directly. It is important to note that the bulk of imported fresh produce is retailed through supermarkets. Small retailers and regional wholesale markets often have difficulties in gaining access to imported commodities. For example, there has been an oversupply of imported sweet cherries in the Tokyo area in recent years, but in regional markets, especially in western Japan, supply has not been meeting potential demand.

In Japan, the number of small, family retail establishments is decreasing, but the speed of that decline is much slower than was observed historically in the United States. As of 1985, there were still in excess of 50,000 vegetable and fruit specialty stores in Japan and nearly 2,000 independent supermarket firms (Ministry of Trade and Industry, 1989). Small retail stores are still commonplace in Japan because most urban housewives go shopping on foot or bicycle almost every day in order to buy the freshest produce possible and to talk with neighbors and store clerks. This is especially true in cities where population densities are high and in areas where consumers are fussiest. In the suburbs, there has been an increase in the number of people who go shopping by car, but the pattern of frequent, small purchases of fresh produce due to the great importance Japanese consumers place on freshness and to the small size of kitchens and refrigerators does persist. These conditions provide an important market niche for small produce retailers in Japan. Given that some supermarket chains have developed a reputation as purveyors of inexpensive but low-quality produce, many small retailers are pursuing a strategy of selling expensive, but superior grade products.

This kind competition between large and small retailers in Japan has benefitted consumers by forcing both large and small retailers, as well as producers, to concentrate on improving the quality of the fresh produce they market. This is one of the principal strong points of the Large Store Law (*DAITENHOU*), which promotes competition by giving retailers a voice in the development of large department stores and shopping malls in established neighborhoods. A common result of the implementation of the Law is that small retailers are allowed to rent space in a new shopping mall or department store. Consumers benefit from the increased selection available and retailers benefit from being located in a common location which attracts larger numbers of consumers.

The biggest reason for the decrease in the number of small retailers in Japan has not been the lack of market opportunities, but rather that the work involved is perceived as being too hard by many young people. The daily routine of small retailers begins at 4 : 30 or 5 : 00 a. m., when they awaken and depart for their local auction market so that they can arrive about one hour before the auction begins in order to inspect commodity samples. After the auction, they supplement the commodities they have bought at auction with purchases from wholesalers' stores in the market. They return to their stores at about 10 : 00 a. m. and prepare product displays until midday. At around 3 : 00 p. m., their peak sales period starts as consumers arrive to begin shopping for the evening meal, and continues until around 7 : 00 or 8 : 00 p. m. They must then tidy up their stores and balance their accounts before they take their evening meal and go to bed at around 10 : 00 p. m. While such a rigorous daily work schedule was commonplace in most occupations in Japan a generation or so ago, many contemporary young people find such a lifestyle unattractive and frequently do not want to succeed their parents in small family businesses.

Similar problems in finding successors to take over the family business are occurring in production agriculture as well as with many of the family run wholesale firms in auction markets. In spite of these and other changes in the structure of the marketing system for fresh produce in Japan, however, auction markets are thriving. As has been described in the above pages, the markets have and will continue to evolve to changing modern conditions. This is exemplified by the increasing use of the markets by supermarket chains and by the recent opening of the new Ota market. The Ota market has 386, 000m^2 of floor space. This is more than 10 times as big as the Kanda market was. Daily sales of fresh produce are approximately 3, 000 tons, as opposed to an average of 2, 000 tons daily for the Kanda market in 1987.

There are 6 auction houses, 208 wholesaler firms and 2, 213 retailers authorized to participate in the new market.

Since the Ota market opened, competition among producers is said to be more intense than it was in Kanda because more varieties of produce are being gathered into the marketplace. Supermarkets are pleased with the Ota market because they can gather large shipments of a wide variety of commodities in one place. The Toichi Tokyo Seika, one of the auction houses active in the Ota market, is said to be intent on increasing *YOYAKUAITAI* for supermarkets and also hopes to develop distribution areas around Tokyo for small retailers. In spite of this, however, 42 wholesalers and 600 small retailers still remained in the Kanda market as of the summer of 1989 in defiance of the Tokyo metropolitan government because their marketing areas are too far from the Ota market. Such behavior is not only an indication of the tenacity of Japanese businessmen in wanting to maintain the economic viability of their firms, but is also an indication of the important role which wholesale auction markets are playing in contemporary Japan.

4. Attitudes of Market Participants

In order to develop a better understanding of the nature of the wholesale auction market system for fresh produce in Japan, a survey of market participants was initiated. This survey was implemented in the spring of 1989 with the assistance of the Tokyo metropolitan government authorities who are in charge of supervising wholesale markets in the Tokyo metropolitan area. It was decided to survey participants in the Kanda Market in downtown Tokyo, which, until the opening of the new Ota wholesale market in May of 1989, was the most important Central Wholesale Market for produce in Tokyo. While the survey was implemented in Kanda, it should be remembered that the bulk of the individuals authorized to participate in activities at Ota were working in Kanda at the time of this survey. The results can thus be said with confidence to approximate many of the dominant attitudes of current Ota market participants.

Surveys were distributed to 200 of the 300 auctioneers working in the market, the owners or managers of the 200 wholesale firms in the market, and 400 of the 1, 800 retailers who are authorized to purchase produce at auction as well as from market wholesalers. With the retailers, the sample was stratified by the eight retail associations active in the market. In addition, as supermarket chains now purchase a large proportion of their produce on order from market wholesalers, produce section chiefs from several large supermarket chains were surveyed by mail. Altogether, completed surveys were received from 124 auctioneers, 73 wholesalers, 236 retailers, and 32 supermarketers.

The purpose of the survey was to discover more about similarities and differences in attitudes towards food quality and food safety between the different market participants as well as to compare these attitudes with those of Japanese consumers. A number of questions in the market survey were identical to those used in a survey of Japanese consumers the previous year. Asking identical questions is not only useful for assessing how in tune with consumer attitudes Japanese market channel members are, but is also valuable for checking the overall accuracy of Japanese consumers' responses. Data from Japanese consumers had been collected in a separate study done in Kobe, Japan and Seattle, Washington (Jussaume, 1989).

Wholesale auction markets in Japan are both complex and sophisticated, with a great number of economic and social transactions taking place daily. Given their role in the market, auctioneers must interact with a great many individuals, although individual auctioneers generally specialize in one or two particular commodities. The auctioneers in our survey indicated that they sell to an average of 174 different buyers. This number varies substantially, with some auctioneers dealing with only a few dozen buyers while others sell to hundreds. This diversity in the number of contacts depends to a large extent on the particular commodity. Purchases of an item like muskmelons, which sells for very high retail prices in Japan and where there is a great deal of price differentiation by quality, are made by a select group of purchasers. The auction houses set up their melon auctions in a different location than those where they sell their other fruits and vegetables. There are generally only a few dozen buyers in the stands, and boxes of melons, which may hold from about two to eight melons, are sold individually. In other words, trading in melons is too expensive and too important to be left to anyone other than specialized buyers and sellers.

For most other commodities, auctions in a large Central Wholesale Market are generally done by sample. Each auction house has two to three dozen auctioneers who sell commodities simultaneously in it's own area filled with a few hundred buyers. Any buyer, which includes wholesalers and authorized retailers, is free to make a bid with any particular auctioneer although most buyers tend to associate and do business with individuals who they know personally and who are selling commodities which they specialize in. Many wholesaler firms specialize in either fruits or vegetables and often specialize in a particular type of fruit or vegetable, for example citrus fruits. In addition, individual buyers from a wholesale firm will further specialize in one or two particular commodities.

Retail buyers, which include supermarket chains, therefore must do business with an array of different wholesalers if they are to purchase the variety of produce they need for their own businesses. This is a demanding task, and retail buyers attend auctions in large measure to obtain information on the quality of produce and corresponding prices available in the market each day. This information helps retailers establish a more favorable bargaining position in their negotiations with wholesalers later on in the day.

While retailers do compare quality and prices for the same commodities amongst different wholesalers, there is a tendency to frequent those wholesale firms with whom retailers have developed a trusting and knowledgeable relationship. Subsequently, the wholesalers responding to our survey reported that they sell to, on average, 59 different buyers while small retailers reported that they buy from an average of a dozen different sellers. Of the wholesalers surveyed, 38. 6 percent said that they knew the names of <u>all</u> the buyers they do business with and an additional 52. 9 percent said that they knew the names of the majority of the retailers to whom they sell produce. Of the retailers, 43. 4 percent said that they knew <u>all</u> the names of the sellers from whom they make purchases and an additional 40. 9 percent said that they knew most of the names.

What this information reveals is that there is a great deal of intimate social interaction amongst wholesalers, retailers and auctioneers in the wholesale marketplace within the context of very intense competition for customers. With the hundreds of different actors present, the possible number of business connections are in the thousands and each particular individual does buy from and sell to dozens and sometimes even hundreds of other individuals. Yet, within this very competitive environment, most participants have a tendency to return and do business with those people with whom they have developed a trusting relationship.

The importance of trust and reliability in Japanese business relationships is further evidenced by the data presented in Table 1. Respondents were asked to indicate which considerations were "Very Important" to them in deciding upon those individuals or firms they buy produce from (in the case of auctioneers, these would be farmers and/or agricultural cooperative organizations). In all four groups of market participants, i. e. auctioneers, wholesalers, small retailers and supermarketers, a far higher percentage of individuals ranked trust in the seller and the seller's reliability as a Very Important consideration than the seller's business reputation, the seller's

Table 1 Considerations Which Are "Very Important" to Channel Members When Deciding on What Sellers They Will Do Business With (Percent of sample indicating that the Consideration is "Very Important")

Consideration	Auctioneers	Wholesalers	Small Retailers	Supermarketers
Seller's Business Reputation	36.8%	39.2%	44.1%	40.7%
Seller's Market Coverage	20.2	21.6	25.1	23.1
Variety of Seller's Products	23.4	44.6	49.8	25.9
Seller's Financing	39.1	46.0	34.7	15.4
Seller's Services	31.9	44.0	44.7	61.5
Trust in Seller	51.6	65.3	64.2	100.0
Seller's Reliability	54.8	56.8	55.7	85.2
Seller's *Ningen Kankei* (Human Relations)	41.9	49.3	50.7	29.6

market coverage, the variety of products which the seller has available, the financing package the seller can provide, or the services which the seller maintains. This is not to say that these latter attributes are not valued by these Japanese businessmen, but they are obviously not valued as highly by as many people as trust and reliability are.

One interesting difference noted in the responses listed in Table 1 was the comparatively small percentage of supermarketers who indicated that a seller's *ningen kankei*, a term referring to the ability to establish and maintain warm relationships, was Very Important. In the cases of auctioneers, wholesalers and retailers, a similar percentage listed trust, reliability and *ningen kankei* as Very Important. Indeed, in a pre-test of the questionnaire, some respondents had a difficult time in differentiating between the three items, since they believed these questions were measuring the same concept. The much lower percentage of supermarketers who believed that *ningen kankei* was Very Important suggests that business relationships with supermarketers is "dry," i. e. distant and cool, in comparison to the "wet," i. e. warm and friendly, relationships favored by traditional Japanese businessmen. However, it is interesting to note that a very high percentage of supermarketers indicated that trust and reliability in a seller was a Very Important consideration, in spite of the fact that fewer of them placed a high value on *ningen kankei*.

As in the United States, knowledge is a key factor in the successful running of a produce business in Japan. Individuals, regardless of whether or not they work for auction houses, wholesale businesses, or retail establishments, spend a number of years apprenticing and learning about the produce business in the auction markets. By the time individuals reach a position where they are engaging in actual buying and selling activities, they have been involved in the business for a fairly long time. Table 2 shows that the majority of the respondents to the survey have spent in excess of 10 years in their business, and the figure is considerably higher for those working in wholesale and retail firms. More than two-thirds of the wholesalers and retailers responding to this survey indicated that they had been in their business for more than 20 years. This, of course, is in part an indication of the family oriented ownership structure of many wholesale and retail operations. Many of the owners and managers of these businesses, who were the respondents to the survey, were trained by either a father or a mentor and will have spent many years in the trade before they are allowed to assume major responsibilities within the firms they own or work for.

Table 2 Number of Years Spent Working in the Produce Business

	Less Than 5 Years	5 to 10 Years	10 to 20 Years	More Than 20 Years
Auctioneers	12.5%	18.0%	53.9%	15.6%
Wholesalers	1.3	4.0	25.3	69.3
Small Retailers	3.1	5.1	14.4	77.4
Supermarketers	9.4	9.4	43.7	37.5

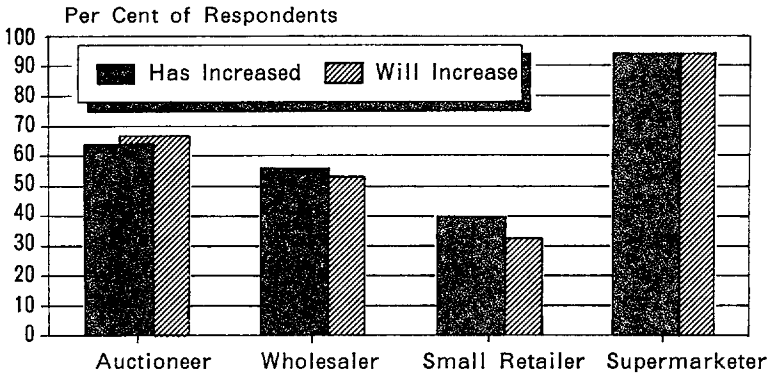

Figure 1 Respondents' Perceptions of Changes in Their Business Volume

These percentages are also related to the fact that in these family businesses fewer and fewer young people are stepping into their father's shoes. As was mentioned in the previous section, many young people do not find the prospect of working long hours in family owned businesses to be very attractive. Subsequently, many small wholesalers and retailers who are involved in the produce trade, like their agricultural household counterparts, are having difficulty finding young people to learn the business. This may be one reason why they are less optimistic about the potential for further growth in their businesses than supermarketers are (Figure 1).

One of the principal objectives of the study was to compare consumer concerns about food safety and quality with those of individuals who are involved in the marketing system for fresh produce in Japan. It was believed that such a comparison would not only offer insights into the quality demands of the fresh produce marketing system in Japan, but also indicate how in tune Japanese wholesalers and retailers are with consumer attitudes in their country. For this analysis, responses from auctioneers, wholesalers, small retailers, and supermarketers are combined together and compared with responses from the consumer survey done in Kobe in the spring of 1988. It should be remember that the vast majority of individuals from the channel member sample were working in the Kanda Wholesale Market in Tokyo at the time of the survey, while the consumer sample was drawn from the city of Kobe. These cities are a little over three hundred miles apart and therefore some differences in responses to the two surveys may reflect regional differences. Nonetheless, it should also be remembered that as one of the most important Central Wholesale Markets in Japan, a great deal of produce was moved through the Kanda market, and now through the Ota market, to smaller wholesale markets throughout the Tokyo metropolitan area and even the country. Therefore, wholesalers and retailers in Tokyo should be in tune with food quality and safety attitudes of the average Japanese consumer, including those in Kobe.

Table 3 compares market participants' and consumers' attitudes towards attributes in fresh produce. In the consumer study, consumers were asked to rank these attributes vis-a-vis fresh apples. In the wholesale market survey, a single commodity could not be selected since auctioneers, wholesalers and retailers all specialize in different commodities. Thus, they were asked to rank these characteristics in terms of fresh produce in general. Channel members were asked to give their own ranking of these attributes in terms of how they incorporate them into their own buying patterns and then were asked to give what they felt were consumer views of the importance of the

Table 3 Comparison of Consumer and Market Channel Member's Attitudes About Importance of Selected Attributes in Fresh Produce

	Channel Members' Own Attitudes		Channel Members' Views on What Consumers Think		Consumers' Own Attitudes	
	Very Important	Important	Very Important	Important	Very Important	Important
Knowing product's origin	38.8%	46.7%	8.6%[b]	38.6%[a]	9.4%	31.4%
Shape of produce	36.6	50.9	24.9[a]	64.5[a]	7.2	48.9
Size of produce	36.5	44.0	20.1[a]	58.6[a]	6.9	51.9
Absence or presence of blemishes	57.3	34.7	57.9	37.5	56.6	34.1
Color of produce	52.8	44.0	50.7[c]	47.2[c]	34.5	55.8
Variety type	43.3	46.3	23.5[a]	39.5[a]	35.5	50.5
Price of item	54.0	37.9	58.2[c]	36.0[c]	26.2	61.7
Taste of item	80.9	17.6	73.0[a]	25.0[a]	88.7	11.0

a) Proportion in "Channel Members' Views on What Consumers' Think" cell is significantly different (at .05 or better) from proportion in "Own Attitudes" cell and "Consumers' Own Attitudes" cell.
b) Proportion in "Channel Members' Views on What Consumers' Think" cell is significantly different (at .05 or better) from proportion in "Own Attitudes" cell.
c) Proportion in "Channel Members' Views on What Consumers' Think" cell is significantly different (at .05 or better) from proportion in "Consumers' Own Attitudes" cell.

selected attributes in the consumers purchases of Produce. Overall, the results of this comparison indicate that channel members are quite in tune with consumer perceptions and desires.

One of the more interesting findings from this comparison is that 38.8 percent of channel members reported that knowing a product's origin was a Very Important consideration to them in their own purchases, but only 8.6 percent of them felt that consumers viewed this as a Very Important consideration, which is a figure similar to the 9.37 percent of Kobe consumers who ranked this attribute as Very Important. What this indicates is that product origin is a crucial consideration for channel members because it is used as an alternative measure of product characteristics which are more difficult to test for. A larger percentage of channel members thought that taste was Very Important to consumers than any other characteristic. This matches the consumers' own attituder. However, it is not possible for channel members to sample and taste produce from each lot that makes its way through the auction markets. Wholesalers and retailers do remember, however, how well produce from a particular region sells and how their customers responded to the quality of that item. They will subsequently bid up produce from certain regions or cooperatives that have a track record of producing high quality produce. There are even some cooperatives in Japan which provide the number of each individual producer on boxes of produce shipped to wholesale auction markets so that farm households which produce superior goods can obtain premium prices for their commodity.

Perhaps the biggest discrepancy in Table 3 relates to channel members' and consumers' perceptions about the importance of the shape and size of a commodity. Of course, the relevance of these attributes obviously varies by commodity, but it is significant to note that more channel members thought these attributes were Very Important to their own decision making than to consumers' buying habits. Once again, shape and size may play a role as a measure for other product qualities, although it also is true that knowing the shape and size of an item is an indispensable piece of information for those who buy at auction. Produce is very carefully graded by size in Japan which aids people who are making bids during an auction. Grading by size means that each box of produce in that size grade has exactly the same number of units in it. Buyers can thus compute possible profit margins in a matter of seconds before deciding how much they are willing to bid for a particular quality grade of a commodity. This consideration is especially imporsant for retailers since most produce items in Japan are not sold at the retail level by weight, but rather by number.

One area where channel members underestimated consumer preference was in variety type. In every other question (except taste of item), channel members typically overestimated the importance of the attribute to consumers. In the case of variety type, channel members consistently underestimated the importance of this attribute to the consumer. In part, this may be an artifact of the way the question was constructed in the two surveys since variety type is bound to be a much more important consideration in apple buying than it is in many other produce items, such as cabbages or carrots.

Of course, these comparisons of channel members' views on what consumers think with the consumers' own answers should be read with some skepticism. Consumers' answers in Table 3 indicate that they attach more importance to taste than appearance and price, as compared with channel members' views on what consumers think. Retailers often say that consumers' answers to such a survey are different from their actual behavior at stores, which is a problemmatic issue in all survey research. If channel members' views are right.

consumers' attitudes probably do not conform perfectly to their behaviors. Obviously, the same is true for market channel member responses as well.

The Kobe consumer survey also featured a number of attitudinal questions about food quality and these were also repeated in the Kanda market market survey. Similarities and differences in the percentages in which channel members' and consumers' strongly agreed or agreed with nine statements about food quality are presented in Table 4. In general, the pattern of agreement is the same, with the highest percentage of respondents strongly agreeing to statements that "Government should protect domestic agriculture," "Farmers should use fewer chemicals in food production," and "Organic produce should be separated from other produce in stores," although the percentage of consumers indicating that these concerns were Very Important were all significantly larger than the percentage of market channel members. Concerns over food safety are very strong and growing amongst Japanese consumers. Market channel members reflect the concerns of consumers and

Table 4 Comparison of Consumer and Market Channel Member's Attitudes About Food Safety and Quality

	Channel Members		Consumers	
	Strongly Agree	Agree	Strongly Agree	Agree
Packaging reflects good quality	3.7%	45.5%[a]	3.8%	16.8%
Farmers produce safe foods	4.5	51.6[a]	3.1	27.6
Domestic food is better than imported	22.0[a]	54.1[a]	9.6	35.1
Government should protect domestic agriculture	46.6	25.0	51.7	26.7
Farmers should use fewer chemicals in food production	48.6[a]	33.5	61.5	28.1
Ag. chemical residues in product are too high	7.9[a]	31.9	18.7	34.1
Government ensures available foods are safe	9.2[a]	41.9[a]	3.6	31.5
Market people ensure foods are safe	12.0[a]	45.1[a]	2.9	30.0
Organic produce should be separated from other produce in stores	43.5[a]	24.4	61.3	24.5

a) Proportion in "Channel Members" cell is significantly different (at .05 or better) from corresponding proportion in "Consumers" cell.

many obviously see the market potential available in supplying consumers with produce which can be demonstrated to be safe. From the standpoint of foreign producers and suppliers, it is interesting to note that while three-quarters of the consumers agreed or strongly agreed that the Japanese government should protect its domestic agriculture, the majority, unlike the channel members, did not agree or strongly agree that domestic food is better than imported. Suspicions amongst Japanese consumers about the safety of both domestic and imported food has been growing in Japan. This provides both an opportunity and a challenge to foreign fruit and vegetable producers and suppliers who are interested in establishing a strong foothold in the Japanese domestic market.

5. Concluding Comments

The Japanese wholesale auction market system is under pressure to change, both from within and without. The constant evolution in the manner in which agricultural commodities are produced and retailed is forcing adaptations in how auctions are conducted and how produce moves through markets. In addition, internal strains on small wholesale and retail firms may lead to a decrease in the number of small, family owned businesses in Japan in the near future. This will certainly have an effect on the structure of wholesale markets and the types of firms that will be found in them. In particular, smaller Regional Wholesale Markets may find it difficult to maintain the volume necessary to remain in operation.

Nonetheless, the auction markets are far from dead. The recent move of the major auction market for fresh produce in Tokyo from Kanda to Ota is an indication of the tenacity and resiliency of auction markets. In addition, evidence presented in this report indicates that auctioneers, wholesalers and retailers are aware of the needs and concerns of Japanese consumers.

Japan's long history of selling fresh produce through a highly competitive and intricate auction system has worked well in maintaining the availability of high quality produce at the retail level. While this system is strained by changes in the modern marketplace, there is no reason to predict that the system will disappear any time soon, especially given that Japanese consumers have expressed a growing willingness to purchase high quality fresh produce, even at higher prices. The efficiency of this system at preserving the quality of highly perishable commodities, and the recent shift back to using Wholesale Auction Markets on the part of Japanese supermarkets, are sufficient evidence to indicate that the system will not disintegrate in the forseeable future.

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「青果物流通アンケート調査」調査表

まず，青果物についてのあなたの考え方をお伺いします。

質問一1　あなたが売買をするとき，次の項目についてどう思いますか。

	一つだけ○で囲んで下さい				
A．包装がよいものは質もよい	まったくそう思う	だいたいそう思う	わからない	ほとんどそうとは思わない	まったくそうとは思わない
B．農民は安全な食物の生産をしている	まったくそう思う	だいたいそう思う	しらない	ほとんどそうとは思わない	まったくそうとは思わない
C．国産食品は輸入食品より質がよい	まったくそう思う	だいたいそう思う	わからない	ほとんどそうとは思わない	まったくそうとは思わない
D．農民は今より農薬を減らして生産をした方がよい	まったくそう思う	だいたいそう思う	わからない	ほとんどそうとは思わない	まったくそうとは思わない
E．質のよい食品を供給するために日本政府は農業を守るべきである	まったくそう思う	だいたいそう思う	わからない	ほとんどそうとは思わない	まったくそうとは思わない
F．青果物には農薬が残りすぎている	まったくそう思う	だいたいそう思う	わからない	ほとんどそうとは思わない	まったくそうとは思わない
G．青果物の規格はもっと簡単にした方がよい	まったくそう思う	だいたいそう思う	わからない	ほとんどそうとは思わない	まったくそうとは思わない
H．政府は国民の食べ物の安全性について十分注意をしている	まったくそう思う	だいたいそう思う	しらない	ほとんどそうとは思わない	まったくそうとは思わない
I．市場関係者は国民の食べ物の安全性について十分注意をしている	まったくそう思う	だいたいそう思う	しらない	ほとんどそうとは思わない	まったくそうとは思わない

J.	無農薬で生産された青果物は他の青果物と区別した方がよい	まったくそう思う	だいたいそう思う	どちらともいえない	ほとんどそうとは思わない	まったくそうとは思わない
K.	政府は有機農産物の基準をつくるべきである	まったくそう思う	だいたいそう思う	わからない	ほとんどそうとは思わない	まったくそうとは思わない
L.	輸入農産物をこれ以上増やさない方がよい	まったくそう思う	だいたいそう思う	わからない	ほとんどそうとは思わない	まったくそうとは思わない
M.	見た目がよい青果物は質もよい	まったくそう思う	だいたいそう思う	わからない	ほとんどそうとは思わない	まったくそうとは思わない
N.	農産物の流通経路をもっと短縮した方がよい	まったくそう思う	だいたいそう思う	わからない	ほとんどそうとは思わない	まったくそうとは思わない

質問一2　国産青果物の品質はこの3年間に変化していると思いますか。

1. 良くなった
2. あまり変わっていない
3. 悪くなった

質問一3　輸入青果物の品質はこの3年間に変化していると思いますか。

1. 良くなった
2. あまり変わっていない
3. 悪くなった

質問一4　国産青果物の品質はこれからの3年間に変化すると思いますか。

1. 良くなる
2. あまり変わらない
3. 悪くなる

質問一5　輸入青果物の品質はこれからの3年間に変化すると思いますか。

1. 良くなる
2. あまり変わない
3. 悪くなる

質問－6　輸入青果物を商う場合の一番大きな利点は何ですか。次のうち一つだけ選んで下さい。

1. 国内にはない「めずらしさ」で売れる
2. 国産品が出回らない時期に売れる
3. 国産品と同じ種類のものでも価格が安いから売れる
4. せりのように価格が変動しないので，安定した取引ができる

質問－7　輸入青果物を商う場合の一番大きな欠点は何ですか。次のうち一つだけ選んで下さい。

1. 最初は「めずらしさ」で売れるが，すぐにあきられてしまう
2. なかなか味に馴染むまでに時間がかかる
3. 品質と価格のバランスで，多少安くても国産品に勝てない
4. 安全性に不安がある
5. 海外産地の情報が足りない

質問－8　国内でも競合品目が生産されている輸入青果物が国産品と競争するために，もっとも強化すべき方法を一つだけ選んで下さい。

1. 国産品種に近い品種に品種更新をする
2. 現在の品種のままで，価格をもっと低くする
3. 味が親しまれるように，広告・商品説明・試食を強化する
4. 安全性を明確にし，その点を宣伝する

質問－9　輸入青果物の値段をもっと下げるためには，次のうち何を最も改善する必要があると思いますか。一つだけ選んで下さい。

1. 生産地の価格を下げる
2. 関税その他の貿易制限を廃止する
3. 輸入業者のマージンを節減する
4. 仲卸業者のマージンを節減する
5. 小売業者のマージンを節減する

質問－10　あなたの仕事については，次のどの人たちの意向を重視しますか。（重視する順に番号を入れて下さい）

1. 消費者 ＿＿＿＿＿
2. 生産者 ＿＿＿＿＿

3. 買い手 ________

4. 仕入先 ________

質問—11 卸売市場が，今後発展するためには，次のうち対応をもっとも強化すべき部門を一つだけ選んで下さい。

1. 産地
2. 仲卸
3. スーパーマーケット
4. 一般小売店
5. 外食産業
6. 食品加工業
7. 消費者

質問—12 卸売市場が，今後発展するためには，次のうちどれをもっとも重点的に取り組む必要があると思いますか。一つだけ選んで下さい。

1. 先取りを拡大する
2. 相対取引を拡大する
3. セリをもっと強化する
4. 物流は市場外で，商流は市場経由の取引を拡大する
5. 外食産業向けの別規格をつくる

質問—13 あなたは，青果物の中間流通業者の方ですか。

1. いいえ—— “いいえ” と答えた人は質問—17までとばして下さい
2. はい

質問—14 あなたは，一日当たり何人の買い手に青果物を売っていますか。

________人

質問—15 その買い手個人の氏名を知ってますか。

1. 全員を知ってる
2. 半分以上を知ってる
3. 半分未満を知っている
4. 全然知らない

質問—16 あなたは，あなたの品物の買い手に対して，次の種類の情報をどの程度提供しますか。

	一つだけ○で囲んで下さい				
A. 消費者の味覚と好み	いつもする	しばしばする	ときどきする	あまりしない	全　然しない
B. 生産地の情報	いつもする	しばしばする	ときどきする	あまりしない	全　然しない
C. その商品のグレード	いつもする	しばしばする	ときどきする	あまりしない	全　然しない
D. その商品の特徴や食べ方	いつもする	しばしばする	ときどきする	あまりしない	全　然しない
E. 価格設定の戦略	いつもする	しばしばする	ときどきする	あまりしない	全　然しない
F. 販売促進・広告方法	いつもする	しばしばする	ときどきする	あまりしない	全　然しない
G. 輸送方法の注意	いつもする	しばしばする	ときどきする	あまりしない	全　然しない

質問—17　あなたが，仕入先を選択する場合に，次の要因をどのぐらい重視しますか。

	一つだけ○で囲んで下さい			
A. その仕入先の評判	大変重視している	ある程度重視している	あまり重視していない	ほとんど重視していない
B. その仕入先の市場占有率の高さ	大変重視している	ある程度重視している	あまり重視していない	ほとんど重視していない
C. その仕入先の品物の種類(品種)の多さ	大変重視している	ある程度重視している	あまり重視していない	ほとんど重視していない
D. その仕入先の代金支払い条件	大変重視している	ある程度重視している	あまり重視していない	ほとんど重視していない
E. その仕入先のサービスのよさ	大変重視している	ある程度重視している	あまり重視していない	ほとんど重視していない
F. その仕入先が信頼できるかどうか	大変重視している	ある程度重視している	あまり重視していない	ほとんど重視していない
G. その仕入先の契約の確実性	大変重視している	ある程度重視している	あまり重視していない	ほとんど重視していない

H. その仕入先との人間関係の深さ	大変重視している	ある程度重視している	あまり重視していない	ほとんど重視していない

質問—18 消費者が，青果物を買うとき，下にあげた各項目を，どの程度重視しているとあなたは思いますか。

一つだけ○で囲んで下さい

A. 生産地	大変重視している	ある程度重視している	あまり重視していない	ほとんど重視していない
B. 形	大変重視している	ある程度重視している	あまり重視していない	ほとんど重視していない
C. 大きさの均一性	大変重視している	ある程度重視している	あまり重視していない	ほとんど重視していない
D. 傷のあるなし	大変重視している	ある程度重視している	あまり重視していない	ほとんど重視していない
E. 色	大変重視している	ある程度重視している	あまり重視していない	ほとんど重視していない
F. 品種	大変重視している	ある程度重視している	あまり重視していない	ほとんど重視していない
G. 値段	大変重視している	ある程度重視している	あまり重視していない	ほとんど重視していない
H. 味	大変重視している	ある程度重視している	あまり重視していない	ほとんど重視していない
I. 鮮度	大変重視している	ある程度重視している	あまり重視していない	ほとんど重視していない
J. 栄養価	大変重視している	ある程度重視している	あまり重視していない	ほとんど重視していない
K. 安全性	大変重視している	ある程度重視している	あまり重視していない	ほとんど重視していない

質問—19 あなたは，青果物を買うとき，下にあげた各項目を，どの程度重視していますか。

一つだけ○で囲んで下さい

A. 生産地	大変重視している	ある程度重視している	あまり重視していない	ほとんど重視していない

B. 形	大変重視している	ある程度重視している	あまり重視していない	・ほとんど重視していない
C. 大きさの均一性	大変重視している	ある程度重視している	あまり重視していない	ほとんど重視していない
D. 傷のあるなし	大変重視している	ある程度重視している	あまり重視していない	ほとんど重視していない
E. 色	大変重視している	ある程度重視している	あまり重視していない	ほとんど重視していない
F. 品　種	大変重視している	ある程度重視している	あまり重視していない	ほとんど重視していない
G. 値　段	大変重視している	ある程度重視している	あまり重視していない	ほとんど重視していない
H. 味	大変重視している	ある程度重視している	あまり重視していない	ほとんど重視していない
I. 鮮　度	大変重視している	ある程度重視している	あまり重視していない	ほとんど重視していない
J. 栄養価	大変重視している	ある程度重視している	あまり重視していない	ほとんど重視していない
K. 安全性	大変重視している	ある程度重視している	あまり重視していない	ほとんど重視していない

質問―20　あなたは，何人の仕入先から青果物を買っていますか。

＿＿＿＿＿＿＿＿＿人

質問―21　その仕入先個人の氏名を知ってますか。

1. 全員を知ってる
2. 半分以上を知ってる
3. 半分未満を知っている
4. 全然知らない

質問―22　次のうち，今後輸入の増加が大きいと思われる青果物をいくつでも選んで下さい。

1.	マンゴー	9.	もも	17.	アスパラガス
2.	パイナップル	10.	バナナ	18.	にんじん
3.	キウイ・フルーツ	11.	パパイヤ	19.	ブロッコリー
4.	メロン	12.	ねぎ類	20.	いも類
5.	オレンジ	13.	かぼちゃ	21.	ほうれんそう

6. りんご　　14. キャベツ
7. さくらんぼ　　15. レタス
8. なし　　16. トマト

質問―23 この3年間に，あなたの販売は増えましたか。

1. 増えた
2. 変わっていない
3. 減った

質問―24 これからの3年間は，あなたの販売は増えると思いますか。

1. 増える
2. 変わらない
3. 減る

質問―25 あなたの商う青果物は，次のうち主としてどれですか。

1. 国産野菜
2. 国産果物
3. 輸入野菜
4. 輸入果物

質問―26 あなたの仕事や業種は何ですか。

1. 仲卸業者
2. スーパーマーケット
3. 一般小売業者
4. 外食業者
5. 納入業者
6. 転送業者
7. せり人

質問―27 今の仕事や業種は何年していますか。

1. 5年未満
2. 5～10年
3. 10～20年
4. 20年以上

質問―28　あなたの会社の従業員数は何人ですか。

正社員＿＿＿＿＿＿＿＿人

パート＿＿＿＿＿＿＿＿人

質問―29　あなたの年齢

＿＿＿＿＿＿＿＿歳

質問―30　あなたの最終学歴

1. 中学（旧制小学校）
2. 高校（旧制中学校）
3. 短大（旧制高等学校）
4. 大学・大学院

質問―31　あなたの会社の年商はどのぐらいですか。

1. 5,000 万円未満
2. 5,000 万円～1 億円
3. 1 億円～5 億円
4. 5 億円～10 億円
5. 10 億円～20 億円
6. 20 億円以上

質問―32　あなたの会社の従業員一人当たりの平均年収は，ボーナス等を全部含めてどのぐらいですか。

1. 300 万円未満
2. 300 万円～500 万円
3. 500 万円～700 万円
4. 700 万円～1,000 万円
5. 1,000 万円～1,200 万円
6. 1,200 万円以上

青果物の販売をもっと増やすための方策についてご意見ございましたらご自由にお書き下さい。

ご協力どうもありがとうございました。

〔要　旨〕

日本の青果物卸売市場の特性(英文)

レイモンド・A・ジュソーム・Jr.
鈴　木　宣　弘
ディーン・H・ジュドゥソン

日本の青果物のせりによる卸売市場流通システムは，全国的な青果物流通において支配的な役割を果たす複雑な社会経済的ネットワークである。せりによる卸売市場流通システムは，日本の青果物の生産・流通において高い競争的構造を生み出し，日本の生鮮野菜・果実の高い品質を生み出す1つの要因となっていると考えられる。本稿の主要な目的は，この日本の青果物卸売市場流通システムの特質を把握することである。

それは次の2段階を踏んで行なわれる。まず，はじめに，その市場流通システムの歴史と構造を概観し，その歴史的および将来的な重要性を明らかにする。その上で，次に，東京の神田市場の現地視察とアンケート調査の結果を検討する。ここでは，卸売会社のせり人・仲卸業者・小売業者の間の人的つながりのネットワークが検討され，また，せり人・仲卸業者・小売業者が消費者の関心事項をどれだけ正確に把握しているかが検証される。

それらの結果，次のようなことがいえる。

① 流通関係者は消費者の関心事項に対してたいへん敏感であり，それをよく把握している。

② 信頼性，契約の確実性，お互いをよく知っていること等の形で示される人的つながりが，このネットワークにおいて重要である。

③ このせりによる卸売市場流通システムは，次第に，より大規模市場への集中化が進み，また，せりによる価格変動が少なくなる方向に展開している。

④ しかし，このシステムは，そうした変化を受容しつつ，当分の間存続しうるものと考えられる。