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THEODORE C. BESTOR

TSUKIJI



THE
Fish
Market
AT THE
Center
of the
World

THEODORE C. BESTOR

TSUKIJI

THE FISH MARKET AT THE CENTER OF THE WORLD



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Half-title page: the Japanese inscription reads "Tsukiji *uogashi*," the
Tsukiji fish quay or fish market

Title page: the crest is Tsukiji's *uogashi* logo

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Philip E. Lilienthal

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B O O K

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築地

TSUKIJI

魚河岸

CALIFORNIA STUDIES IN FOOD AND CULTURE

Darra Goldstein, Editor

*For Vic,
for being here through the raw and the cooked*

Preface

Economic theorists, like French chefs in regard to food, have developed stylized models whose ingredients are limited by some unwritten rules. Just as traditional French cooking does not use seaweed or raw fish, so neoclassical models do not make assumptions derived from psychology, anthropology, or sociology. I disagree with any rules that limit the nature of the ingredients in economic models.

George A. Akerlof, *An Economic Theorist's Book of Tales* (1984)

During the boom years, books about Japanese markets became commonplace: market access, market secrets, market barriers. Then, market meltdowns.

Even in the wake of Japan's sustained economic downturn since the early 1990s—or perhaps especially in that wake—there is much to be learned from Japanese markets: about how Japanese economic life is organized, how markets are formed out of the cultural and social stuff of everyday life in this or any other society, how economic activity is embedded in social institutions.

This is another book about a Japanese market. I cover the waterfront, exploring currents of collusion, favoritism, and inefficiency; close relationships between trade cartels and government bureaucracies; patterns of insider trading; and asymmetrical flows of information around which *keiretsu*—vertical combines—are organized. I describe trends in marketing and in the microdifferentiation of consumption as the prosperity of the past two generations has transformed the lifestyles of most urban Japanese. I examine the dynamics of employer paternalism, the management of consensus, and the cultural underpinnings of economic and social dynamism, from techniques that samurai used for managing market behavior to the twentieth-century expansion of Japanese trade overseas. And with Japanese political and economic systems now almost endlessly adrift amid scandal, self-doubt, and stagnation, I discuss how the economic success of the 1980s has given way to the economic recession and psychological depression of Japan after the Bubble.

But *this* market study does not herald lessons for foreign businesspeople to apply in their own organizations. I do not tout any twelve-step programs to success in one's dealings with Japanese trade partners. Nor is it a triumphal exposé of why Japanese markets don't work, why Japanese eco-

conomic success was short-lived, or why Japan's economic miracle was a sham to begin with. No theory Z; no enigmas of power; no five rings; no free sushi.

Instead, this is an ethnography of trade and economic institutions as they are embedded in and shaped by the cultural and social currents of Japanese life, an ethnography of how economies—how markets—are themselves created by the production and circulation of *cultural* and *social* capital as well as of goods, services, and financial assets.

I focus on a market of singular scale and scope: Tsukiji, the world's largest marketplace for fresh and frozen seafood, which supplies Tokyo's sushi chefs and homemakers alike. Located in the middle of Tokyo, only a few blocks from the Ginza shopping district, the Tsukiji marketplace is a prominent landmark of the city, well known but little understood by most Tokyoites, and also a popular and fascinating destination for foreign tourists. It is a modern market with an enormous volume of trade—roughly ¥544 billion (\$4.7 billion) worth of seafood in 2001, about 2.3 million kilograms a day—and it is also a marketplace with a venerable history dating from the early seventeenth century. Tsukiji is closely attuned to the subtleties of Japanese food culture and to the representations of national cultural identity that cloak cuisine, but this is also the market that drives the global fishing industry, from sea urchin divers in Maine to shrimp farmers in Thailand, from Japanese long-liners in the Indian Ocean to Croatian tuna ranchers in the Adriatic.

Tsukiji's vibrant present and colorful past reflect the market's significance along many dimensions—cultural, historical, economic, culinary, institutional, and social—and readers may come to this book curious about quite distinct and widely varying aspects of the marketplace.

Anthropologists and other social scientists who study markets, exchange, and commodification may be most interested in the social structure of economic process and the role of a marketplace as a cultural institution. Professionals in the seafood industry may want to learn about the channels of trade and the culture of cuisine within the world's largest and at times most profitable seafood market. Urban specialists may look for analyses of infrastructure as an important element in the cultural construction of space and place. Academic specialists on Japan may focus on the historical development of the marketplace, its relationship to food culture and consumption, its resonances with the mercantile lifestyles of "downtown" Tokyo, and the interlocking cultural meanings and structural forms that create distinctive modes of economic organization. Trade officials and businesspeople may

be interested in questions of market access, the spread of supermarkets, and the structure of distribution channels.

To help readers navigate the pages ahead, I offer here a brief overview of the chapters that follow. The Tsukiji marketplace is complex and any good account of it must necessarily be rich in facts both big and small. Inevitably, I repeat myself from time to time as I try to explain the flow of institutional life and the market's dynamics; the minutiae may strain the attention of some readers while occasional repetitions of explanations, definitions, or crucial events may irritate others. Chapters 1 and 2, in particular, briefly introduce material that I explore in greater depth in later chapters. The devil is, indeed, in the details—particularly for an author—but equally, from those details, I hope, will emerge a clear picture of the fascinating enterprise that is Tsukiji.

In chapter 1, "Tokyo's Pantry," I describe my own introduction to Tsukiji and how my research developed out of an initial interest in the small-scale family-operated businesses so characteristic of Tsukiji and many other sectors of the Japanese economy. I outline my anthropological approach to Tsukiji as an ethnographic study of complex institutional structures attached to and motivated by the dynamics of cultural meaning, a cultural version of institutional economics. This chapter also places Tsukiji in wider cultural, historical, and social contexts: as a central element in Tokyo's infrastructure; as a key site for the transmission and transformation of Japanese food culture; as a crucial link between Japan's domestic fishing industry and the global exploitation of marine resources; and as an exemplar of Japanese distribution channels.

The book's second chapter, "Grooved Channels," walks the reader through Tsukiji's physical layout and its daily rhythms, and discusses the way in which market and place—economic exchange and the spatial and temporal frameworks that order it—are inextricably intertwined. Visitors to the marketplace who want an overview of the market's sights and sounds may find this chapter a good place to begin.

"From Landfill to Marketplace," chapter 3, gives a brief history of the market from the early seventeenth century to the present. I focus primarily on Tsukiji's institutional evolution as Japan's political economy moved from seventeenth-century feudalism to late-twentieth-century bureaucratic capitalism, and discuss the cultural identity that Tsukiji's traders derive from the market's history.

Readers particularly interested in Japanese food culture may want to start with chapter 4, "The Raw and the Cooked." Here, I focus on seafood as

a central aspect of Japanese culinary culture and consumption to explain the tricky currents of trade and custom that Tsukiji traders must navigate in their daily business and that shape the social structure of culinary specializations within the marketplace.

The next three chapters examine the social networks and institutions that make the market run. In chapter 5, "Visible Hands," I discuss the structure of auctions; the roles of auction houses, auctioneers, and traders; and the ways in which the institutional structures of trade are linked to patterns of vertical coordination and horizontal cohesion that center on the exchange of contextualized information. "Family Firm," chapter 6, describes the dynamics of family firms, including patterns of inheritance, apprenticeship, and training, as well as various personal affiliations among wholesalers, such as kinship and hometown ties. Chapter 7, "Trading Places," examines the social institutions and relationships that organize traders' activities, including the determination of auction rules and other norms of trade, the institutionalized trade guilds that govern much of the market's activities, the formation of alliances and coalitions among wholesalers, and principles of competition and equalization that run through the traders' institutional lives.

"Full Circle," chapter 8, summarizes my ethnographic conclusions about the institutional structure of trade and the cultural meanings that attach to and motivate the market's social structure, both formal and informal. I place these conclusions in several broader contexts, including interpretations of Japanese economic organization and behavior; anthropological perspectives on markets, exchange, and commodification; and anthropological engagement with the analysis of complex, urban, industrial societies.

The worlds of Japanese cuisine and of wholesale markets have highly specialized vocabularies, so for both traders and food aficionados the glossary may be useful.

Because Tsukiji is a popular attraction, I offer general suggestions for tourists in "Visiting Tsukiji" (appendix 1).

And finally, Tsukiji is a swiftly moving place: for up-to-date information on market trends, trade channels, and environmental issues, "Video, Web, and Statistical Resources" (appendix 2) lists many links related to the marketplace and wider worlds of the fishing industry, including my own Tsukiji research homepage, www.people.fas.harvard.edu/~bestor/tsukiji.

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The Ginrinkai, an informal reading room and social club located inside the marketplace, often provided me with pleasant company in which to pursue extended discussions of the market both past and present. I was taken under the wing of the Ginrinkai's director, Nishimura Eiko (1923–1996), a woman who presided with earthy cynicism over her corner of Tsukiji (and it was a much larger corner than her crowded rooms would have suggested to a casual observer).

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Like wholesale markets, scholarly communities are held together by complex forms of exchange, with transactions conducted in varying currencies. An author incurs debts in the intellectual (and political) economy of scholarship as well as in its moral economy. The exchange rates are tricky,

as I have found, but moral support is the only hard currency, and in this realm I have racked up enormous debts that I can never fully repay. Without the generosity of time and spirit of many colleagues who gave advice, read drafts, noted errors, encouraged me through moments of despair, suggested other approaches, convinced me that I was not crazy (and pointed out when I was), this book would not have been completed.

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