

JAPANESE WHALING STRATEGIES

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(Date: 8 December, 2008)

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Abstract

The rapid depletion of natural resources has led to a greater focus on sustainable management systems. This case study examines the challenges faced by the Japanese whaling industry, in an environmentally conscious world. Strategies adopted by Japan to promote whaling in the midst of growing concern by members of the International Whaling Commission, special interest groups and non-whaling countries are discussed.

JAPANESE WHALING STRATEGIES



“Fifty of the humpback whales that recently passed by Sydney could be targeted by the Japanese ‘scientific whaling’ program in the Southern Ocean, and their meat processed into whale burgers or fried and seasoned with soy sauce” (Smyth, 2005).

During the past decade there has been increasing global concern over the depletion of natural resources. It is widely accepted that sustainable management systems are essential for the long term preservation of scarce resources. These systems build on a balance between the economy, the environment and social responsibility (Jørgensen, 2007). Yet, the divergent interests of nations present significant challenges in the management of depleting resources. One such resource that is rapidly depleting, is the number of whales in the ocean. This case study focuses on the global strategies adopted by the Japanese whaling industry in the midst of strong objection by several countries who promote whale conservation. The case also examines the emotive responses by several special interest groups such as Greenpeace, who are genuinely concerned about perceived “cruel hunting tactics” adopted by the Japanese whaling industry.

The Whaling Industry

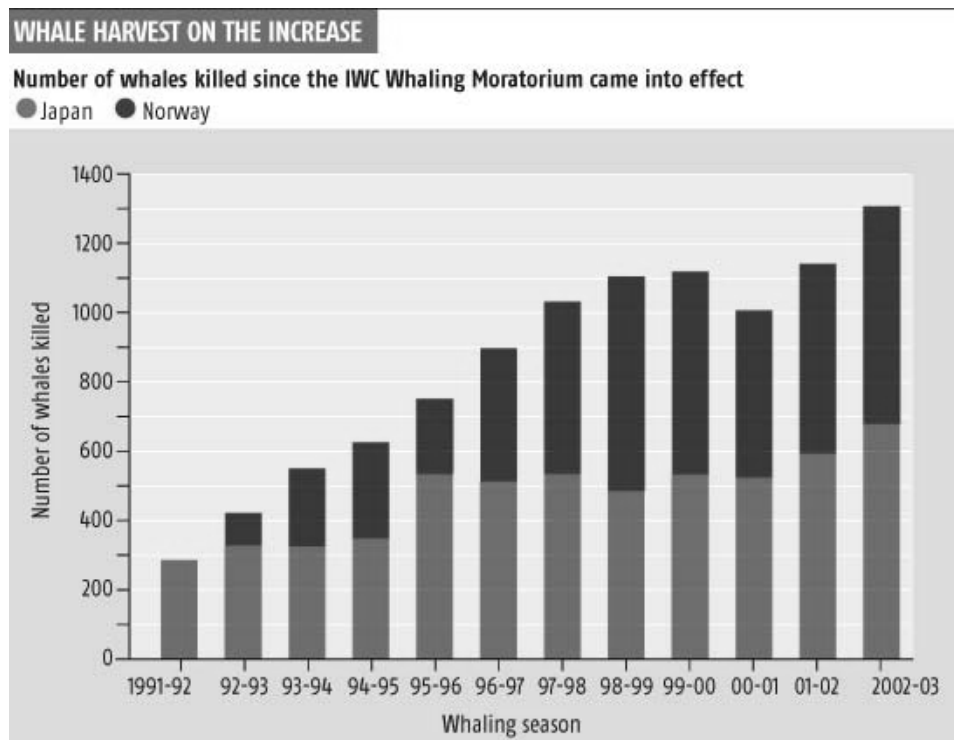
The global whaling industry has changed from a regime that permitted unregulated commercial whaling to one with a high level of global conservation and regulation, protecting the now endangered species. Whaling has a long history in Japan. The practice is thought to have begun more than two thousand years ago and was more recently expanded after World War II when Japan used whale meat to cope with food shortages (Agence France Presse, 2005a). Whale meat was cheaper than beef and was fed to generations of Japanese children in the decades following the War

(Simmonds & Johnstone, 1994). This practice was discontinued when uncertainty about whale stocks resulted in increases in the cost of whale meat.

The concern over whale numbers eventually led to an International Whaling Commission moratorium banning commercial whaling in 1986 (Schaefer, 2003). This agreement is not a binding agreement, and allows some whaling under certain circumstances (Begley & Hayden, 2000). There are some countries like Japan, that maintain whaling industries. Japan's whaling industry is not strictly commercial. It operates under an International Whaling Commission provision for scientific research and whales are studied before being sold (Begley & Hayden, 2000; Murray, 2005). This program is often criticised as a cover for commercial whaling. Scientists cite an apparent lack of published research from the Japanese scientific research program and question the need to kill whales when non-lethal research methods are available (Alford, 2005a; Alford, 2005b).

Since the moratorium came into effect in 1986, more than 7000 whales have been killed under the banner of scientific whaling research, mainly by Japan (Holmes & Graham-Rowe, 2005). However, Japan's whaling numbers have not fluctuated much. Japan has maintained its level of whaling by merely changing its stated intention from 'whale harvesting' to 'scientific whaling'. Norway experienced a significant increase in whaling between 1992-93 and 1997-98. During the subsequent years, Norway harvested between 500 to 600 whales each year (see Figure 1). Norway is able to maintain the only commercial whaling industry in the world as it did not sign the International Whaling Commission moratorium (Agence France Presse, 2005b). Iceland does not have a commercial whaling industry, but continues whaling under provisions for scientific research (Alford, 2005a; Begley & Hayden, 2000). Indigenous communities from various nations hunt small numbers of whales under cultural exemptions (Alford, 2005a).

Figure 1: The Number of Whales Killed since the International Whaling Commission Whaling Moratorium came into effect
 (Source: Holmes & Graham-Rowe, 2005)



The Japanese have always considered whales as a renewable resource, which is why Japan sees whaling as a fisheries and resource use issue (Wong, 2001). "Whales are just as important, and no more special, than any other fish," says Japan Fisheries Agency spokesperson Hideki Moronuki, maintaining Japan's long-held position that marine mammals should get no special treatment for being warm-blooded (Sekiguchi, 2007). The whaling industry is supported by the Japanese government, yet faces strong threats from other sources. Japan maintains that with a population of around 40,000 humpback whales, growing at 15% a year, the formerly endangered humpback has recovered to a sustainable level for lethal research. Anti-whalers do not agree with these estimates and simply see this as raw defiance. "They're just doing this to show us that they can," says Paul Watson, founder of the anti-whaling Sea Shepherd Conservation Society (Sekiguchi, 2007).

The Cruelty of Whaling

Japanese whaling is seen by special interest groups such as the World Society for the Protection of Animals (WSPA), as a cruel practice which inflicts severe suffering on whales. The main method of killing whales is to use a grenade-tipped harpoon. The whales are first speared with the harpoon, which sinks thirty centimetres into the whale's flesh, before the grenade detonates. However, Japan's own statistics indicate that 60% of whales do not die immediately and a second harpoon or a rifle is often used to kill the whale. It appears that Japanese whalers use minimum amount of explosives in order to preserve as much whale meat as possible. Marine Mammal Program Manager Claire Bass makes the following observation: "In several of the pictures we see harpooned whales alive and fully conscious, thrashing in the water and even attempting to dive against the harpoon line in a desperate attempt to escape. It is clear that in some cases the harpoon has entirely penetrated the whale's body. One whale was seen blowing blood through its blowhole as a result of the devastating internal injuries caused by the harpoon" (World Society for the Protection of Animals, 2008).

A report by the International Fund for Animal Welfare (IFAW) found that more than 80% of whales are not killed instantly once harpooned. This is due to the lack of ability of harpoon gunners to hit the area close to the whale's brain. Once harpooned, whales are often alive when they are winched into the hunting ship with the harpoon embedded into their flesh, causing severe suffering. Many whales that are winched in alive, do not die from the blow of the harpoon, but of suffocation, with their blow holes forced under water by the process of winching them in. Whales that are not killed instantly by the harpoon may struggle from ten to thirty five minutes before dying, exhibiting signs of acute suffering during this period. IFAW Australia Country Director Mick McIntyre said: "What Japan is doing to whales is not just cruel, it's criminal. The International Whaling Commission has ignored this fact for too long. We are very pleased that Australia, a key member of the International Whaling Commission, has acknowledged the importance of this report, and has taken a lead to raise the issue of cruelty at the meeting of the International Whaling Commission" (International Fund for Animal Welfare, 2006).

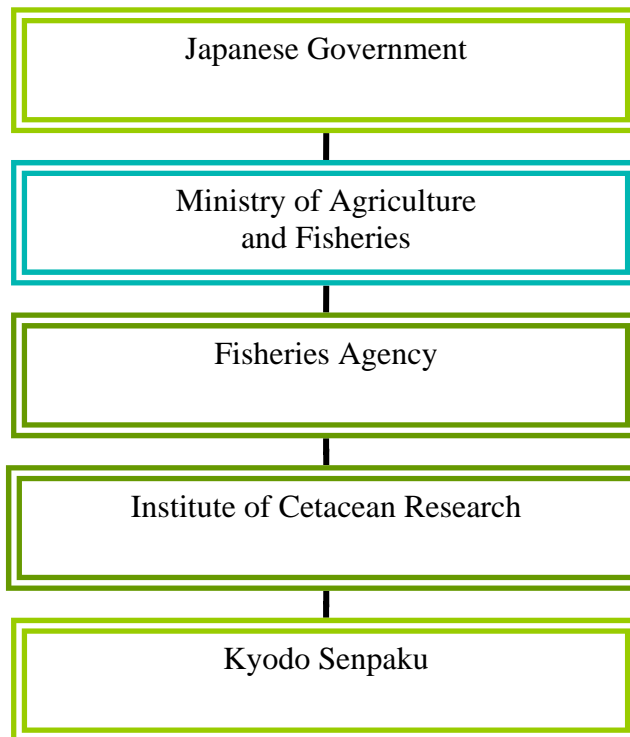
The Japanese Whaling Industry Value Chain

Japan's whaling industry is very much a product of the Japanese government (Schaefer, 2003; The Economist, 2000). Its primary objective is for a return to commercial whaling, and its fall back plan is to pursue increased quotas for scientific purposes (Japan Whaling Association, 2005).

The Japanese kill more than 1000 whales per year for scientific research which conservationist groups regard as little more than a backdoor to commercial whaling (Walsh, et. al. 2005). The International Whaling Commission (2004) says that creatures killed for scientific purposes should be processed, opening the door for commercialisation of scientific products, and a \$38 million per year industry for selling whale meat. Scientific whaling is not constrained by a systematic quota setting, causing large numbers of whales to continue to be killed (Holmes & Graham-Rowe, 2005). It is worth noting is that catches of Baird's beaked whales, Pilot whales and Dall's porpoises occur within Japanese coastal waters (Pacific Whale Foundation, 2006). These catches which are destined for the domestic market, are outside the International Whaling Commission jurisdiction. About 66 Baird whales are taken a year. However, statistics on the other species are not readily available (Associated Press, 2006).

The structure of the Japanese whaling industry is under the control of the Japanese Government through the Ministry of Agriculture, Forestry and Fisheries (see Figure 2). As an affiliated body of the Ministry, the Fisheries Agency entrusts scientific whaling to the Institute of Cetacean Research (established in 1987) which contracts Kyodo Senpaku (a consolidation of whaling departments) and its 300 employees to physically carry out whaling (Greenpeace Japan, 1998-2005). As the sole company in Japan to own whaling vessels and operate in the Antarctic, Kyodo Senpaku receives its US \$45 million annual revenue from the Institute of Cetacean Research, in addition to grants from the trade body Japan Whaling Association (The Economist, 2004).

Figure 2: The Structure of the Japanese Whaling Industry



The value chain commences from the Institute of Cetacean Research, which sells some 2,000 to 3,000 tonnes of packaged frozen remains of whale meat to the Japanese Government in order to cover the costs of research. The government then sets the price for the whale meat which can fetch between 3000 to 7000 yen (US \$30 to US \$70) per kilo, depending on the cut. In stark contrast, a Japanese customer at a restaurant in Osaka pays about 13000 yen (about US \$130) for a 'whale set-dinner' (Ohse, 1993; The Economist, 2000). The meat is first distributed to local governments before being sold via wholesale fish markets to department stores, restaurants and sushi bars. Interestingly, the Japanese Government retains approximately one fifth of the Institute of Cetacean Research whale meat for the purposes of promoting the consumption of whale meat (The Economist, 2004). Both the structure and value chain of the Japanese whaling industry evidences the close relationship between the government, the research institute, the trade association and the fishing company (see Figure 3). It also demonstrates the strong role of government as regulator, facilitator and customer of the industry.

The Japanese government and Japan Whaling Association are now implementing new strategies to increase the demand for whale meat. In order to increase Japanese domestic whale consumption, the following measures have been put into

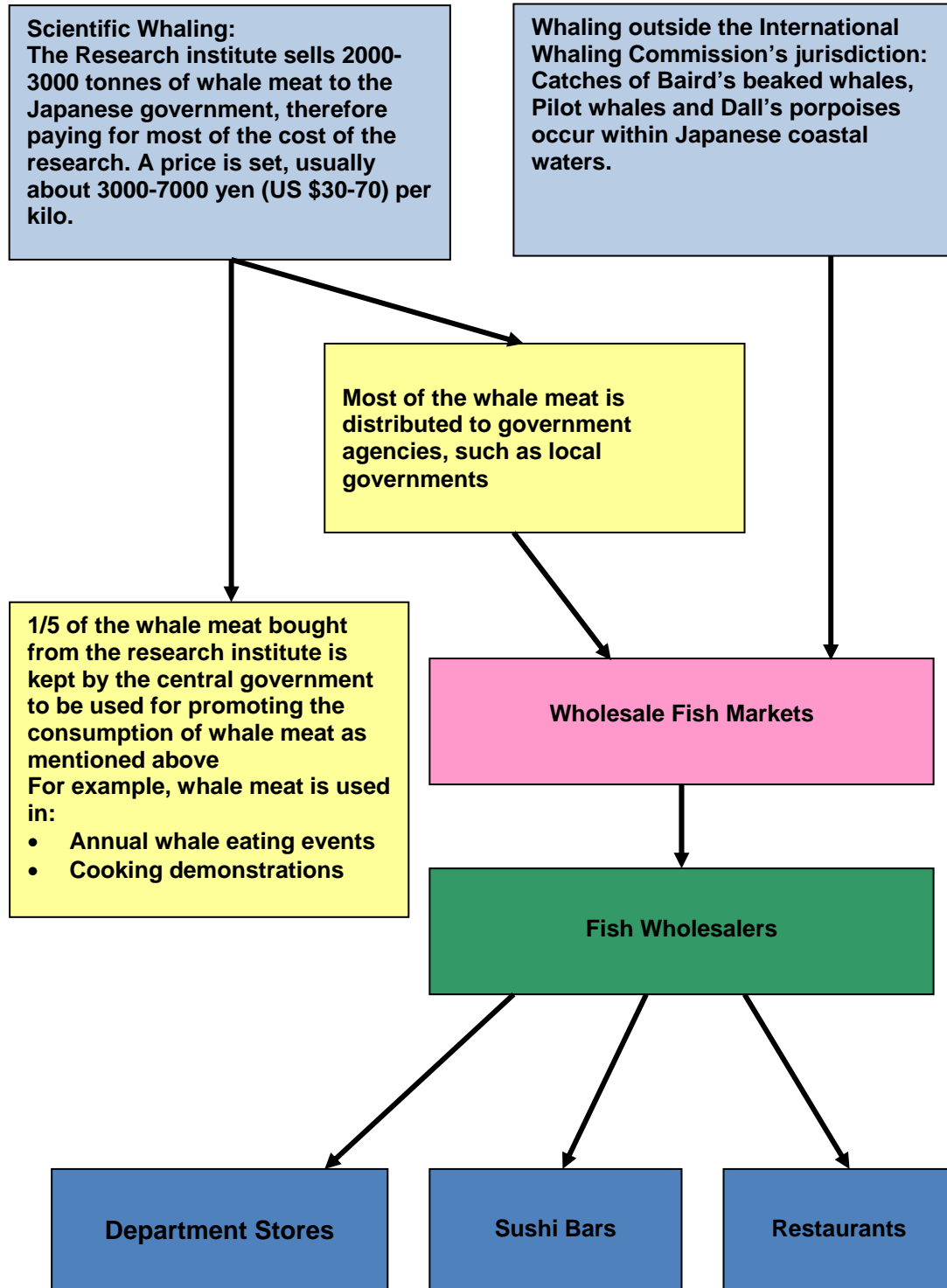
place (Holmes & Graham-Rowe, 2005; Smyth, 2005; The Economist, 2004; Walsh, Sekiguchi & Toyama, 2005):

- Price subsidies
- School lunch menus and whale meat sold in school canteens
- Giving away blubber ice-cream
- Cooking demonstrations and publishing cookbooks
- Advertising campaigns
- Producing a musical in 2002 to promote whale meat
- Introduction of whale burgers called the 'big minke' at fast food chains such as Lucky Pierrot
- The holding of an annual whale-eating event

The Japanese government hopes that these promotions will eventually lift the demand for whale meat in Japan. This may explain the keenness of the Japanese to resume commercial whaling.

Figure 3: The Whaling Value Chain in Japan

(Holmes & Graham-Rowe, 2005; Ohse, 1993; The Economist, 2000 & 2004)



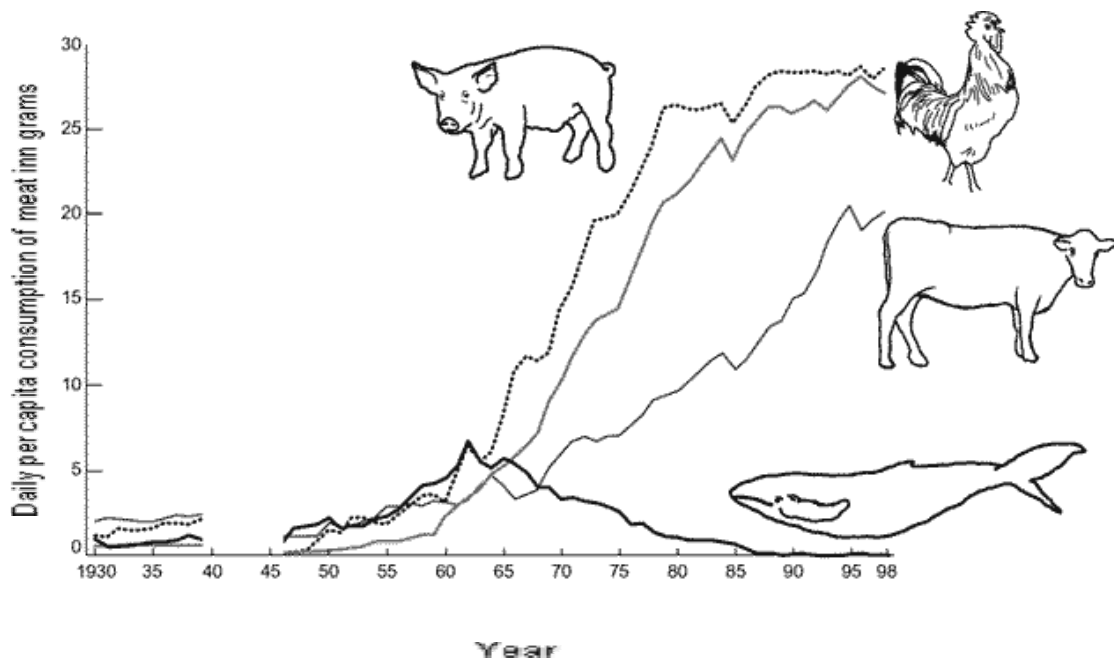
The Macro Environment

In order to fully appreciate the strategies adopted by the Japanese, an understanding of the macro environment is necessary. Therefore, the macro environment is examined below using five factors, namely socio-cultural, demographic, economic, political/legal, and technological. Changes in the five factors of the macro environment can have a direct impact on any one of the forces in Porter's (1979) model (Hill, Jones & Galvin, 2004).

Socio-cultural

The Japanese market is the principle market for whale meat and blubber products in the world (Greenpeace, 2005). However, whale meat does not appear to be a common element in the Japanese diet today (see Figure 4).

Figure 4: Daily Per Capita Consumption of Meat in Japan from 1930-1998
(Source: Greenpeace Japan, 1998-2005)



Greenpeace Japan responds to the argument forwarded by Japan Whaling Association that preventing Japan from foregoing whale as a cultural food is equivalent to 'Americans being asked to stop eating hamburgers' (Japan Whaling

Association, 2005). In Japan, the average annual consumption of whale meat is less than 30 grams per person so the average Japanese eats 40 times as much meat in hamburgers compared to whale (Greenpeace Japan, 1998-2005). This is somewhat confirmed by Seiji Ohsuma, Director of the Institute of Cetacean Research who stated that annual consumption of whale per capita 'was only about 30 grams' (Greenpeace Japan, 1998-2005). The potential threat here is the fact that whale meat is certainly not as popular as other meat sources in the Japanese diet.

Demographic

The younger generation may pose the greatest threat to pro-whaling interests. Danaher (1996) found that Japanese between the age of 20 to 29 years, show the greatest concern for the environment than any other age group. However, Japan rates high on pragmatism, masculinity, and uncertainty avoidance, and fairly high on power distance' (Deresky, 2002:85-86). This combination of uncertainty avoidance and high power distance indicates that challenging authority goes against the social ethos. Danaher suggests that 'the triumvirate of business, bureaucratic and political establishments is perceived to continue its dominance over Japanese society and gives little encouragement to ordinary Japanese people to show their dissatisfaction with certain policy decisions' (Danaher, 1996).

Economic

A return to commercial whaling is also likely to negatively affect the lucrative whale watching industry worldwide, something which could cause widespread discontent and anger against pro-whaling nations. In Australia, the whale watching industry generates more than 100 million dollars annually (Murray, 2005). Until recently whale watching attracted more than 277,000 tourists to Iceland and generated approximately US 8.5 million dollars in 2001. When compared to the 3 to 4 million US dollars of annual revenue that commercial whaling generated in Iceland between 1986 and 1989, it is understandable why Iceland's government responded favourably to the Icelandic Tourist Association's request to limit its scientific whaling quota.

Political/Legal

Japan is perceived to flout the rules of the International Whaling Commission by carrying out commercial whaling under the guise of 'scientific research', thus exposing the country to a potential image problem (Greenpeace, 2005). Japan maintains that the International Whaling Commission is deviating from its original objective to promote 'the orderly development of the whaling industry'. Japan Whaling Association attributes this to the fact that the International Whaling Commission is now controlled by a majority of anti-whaling groups, backed up by anti-whaling non-governmental organisations, which have effectively stopped commercial whaling. In addition, Japan Whaling Association asserts that the International Whaling Commission is now violating the Vienna Convention regarding the interpretation of international treaties requiring signatories to act in 'good faith' (Japan Whaling Association, 2005).

Technological

The rapid growth of the internet and other communication technologies have played a significant role in threatening the existence of global whaling. Such technological advances have increased the voice and power of anti-whaling groups such as Greenpeace. These organisations are able to disseminate information to a huge global audience and encourage anti-whaling protests through mechanisms such as rallies and boycotts (Henke, 2004). In order to remain in power, governments are inclined to act according to the will of their citizens and vote against pro-whaling legislation at international forums.

Global

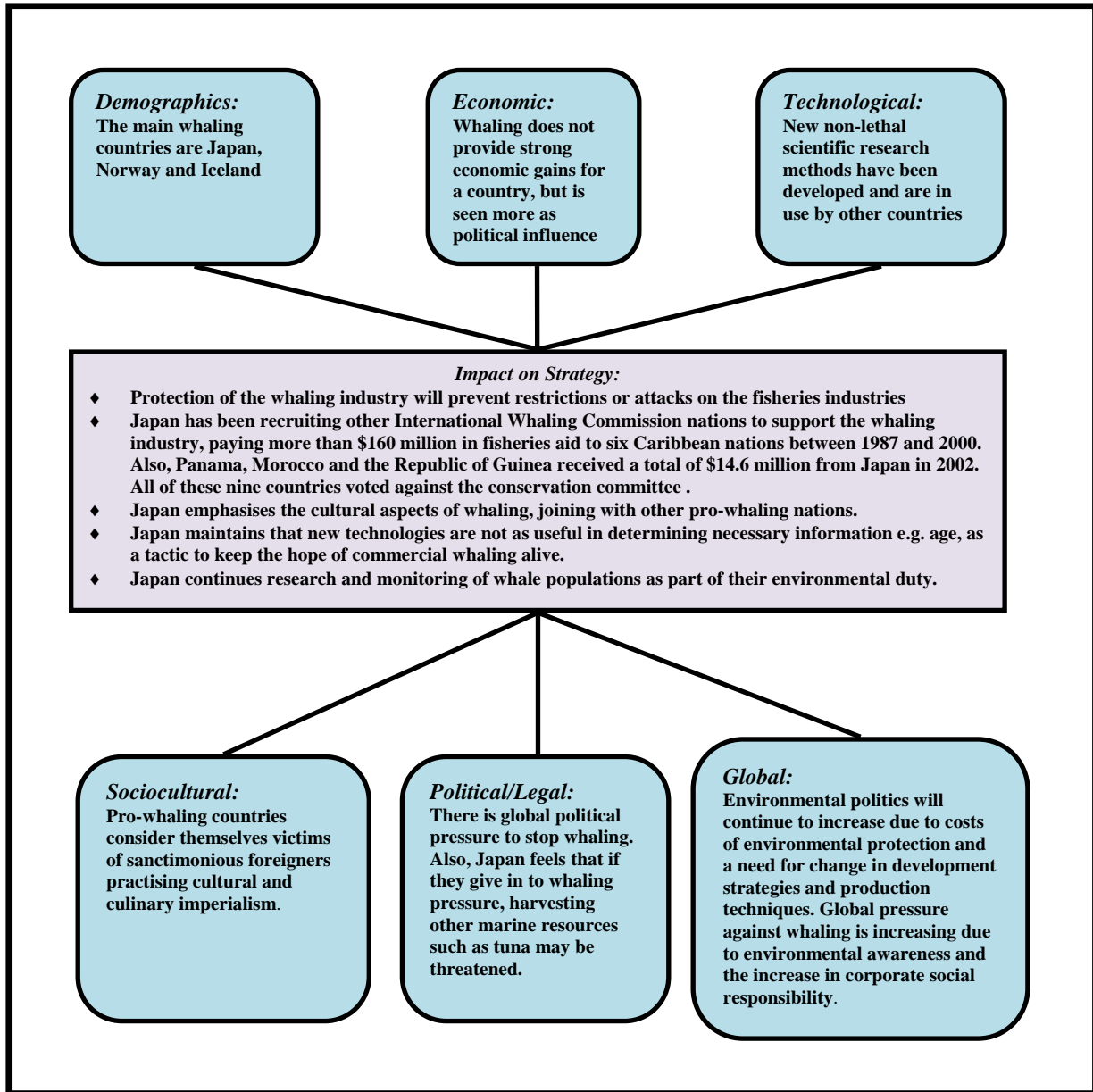
Global trade dependencies are a reality of the economy in which pro-whaling nations operate (see Figure 5). Belonging to multilateral trade agreements such as the World Trade Organisation (WTO) and Convention on International Trade in Endangered Species of Wild Fauna and Flora (CITES) leaves pro-whaling nations open to the threat of disciplinary action through such mechanisms as trade sanctions. For example, the United States Government expressed 'extreme disappointment' at

Iceland's decision to commence scientific whaling and to sell the remaining whale meat to Japan. The United States threatened to review options for trade sanctions under the Pelly Agreement 'which mandates US State Department take action against countries that are undermining international agreements (such as CITES) to protect endangered species' (Greenpeace, 2005).

Global environmental concerns could also damage the image of the Japanese Whaling Industry. Whale products are contaminated with organochlorins including PCBs which are known to 'damage the development of the young and affect reproduction'. In addition, the blubber of some whales has even been classified as toxic waste (Greenpeace, 2005). In 2000, Seiji Ohsuma, Director of the Institute of Cetacean Research confirmed substantial toxicity levels in Minke whales on the domestic Japanese market (Greenpeace Japan, 1998-2005) – a factor which could indeed damage the image of whale products and further lower switching costs to substitute meat sources.

Japan has been accused of using the promise of aid to small, impoverished nations 'in order to gain appreciation of Japan's position' on whaling issues (Bailey et al, 2002; Earth Island Journal, 2001-2002; Russell, 2003). These accusations have been strenuously denied by the Japanese government. Ironically, Greenpeace has also been accused of using its funds to entice support from less developed nations. Both sides actively seek support from other countries to boost their supporter numbers in crucial International Whaling Commission votes which require 75% of member support for regulations to be passed.

Figure 5: Current Global Environmental Conditions by Segment
 (Constructed using the following sources: *The Economist*, 2004; Russell, 2003)



KARION Consultants' Report

Concerned about the increasing negative publicity that its pro-whaling global strategies have encountered, the Japanese government contacted KARION, a leading Strategic Sustainable Management Consultancy firm, to conduct a strategic analysis of the Japanese Whaling Industry. The consultancy firm applied Porter's (1979) Five Forces Model to conduct the study (see Figure 6) and submitted its preliminary report. Porter (1979) postulated that the following five forces would impact on an organisation's behaviour in a competitive market:

- The rivalry existing between sellers in the market
- The power exerted by the customers in the market
- The impact of suppliers on the sellers
- The potential threat of new sellers entering the market
- The threat of substitute products becoming available in the market

Porter (1979) argued that to formulate appropriate strategies in order to succeed in their markets, organisations must have an understanding of the nature of these forces and the potential impact on their operations. KARION assumed that there was no distinction between individual players in the Japanese whaling industry and the industry as a whole. Rather, the different nations participating in the industry were considered competitors/individual players. KARION based its assumption on the fact that at present, there is only one main company in Japan, that is involved in whaling. This company is Kyodo Senpaku and it employs around 300 people. Some employees are skilled in whaling while others specialise in filleting and dissecting whales (The Economist, 2000). A summary of KARION's report is given below.

Threat of New Entrants

KARION found that the threat of new entrants to the whaling industry is low. Differentiation by product is difficult as the demand for 'freshness' cannot be met when whale meat is delivered as a frozen bi-product of scientific research either from Japan, Norway or Iceland. Economies of scale are also difficult to achieve as the product is restricted to quotas set by the International Whaling Commission. Should

Japan be successful in resuming commercial whaling, it already has first mover advantages in know-how and facilities. Japan specialises in the mass production and automation of both factories and whaling ships – a result of heavy investments in the 1960s (Whale and Dolphin Conservation Society, 2005). Finally, current government ownership and control of the whaling industry implies that new competitors would face significant barriers to entry as access to production, distribution channels and whaling facilities are carefully regulated (The Economist, 2000).

Bargaining Power of Suppliers

The bargaining power of suppliers to the Japanese market is high. There are a few dominant suppliers of whale products to the Japanese market. As the primary supplier, it is evident that the Japanese whaling industry under direct control of the government, would possess significant bargaining power over fish wholesalers and retailers such as restaurants (The Economist, 2000). Effectively, as the government sets prices for whale products prior to distribution, it would seem there is no place for any form of bargaining. As for the other supplier nations of Norway and Iceland, their bargaining power is evidenced by the high prices paid for whale meat by Japan (Greenpeace, 2005). Further, the supply of whale meat is tightly controlled by quotas under the International Whaling Commission rules (Parry, 2005).

Bargaining Power of Buyers

The bargaining power of buyers is low because of the limited supply of whale meat. This can exacerbate if consumer demand increases significantly. Naturally, buyers would want to pay the lowest possible price in order to receive higher profits from the 'on-sell'. However, as the Japanese Whaling Industry controls prices, there is little possibility for negotiation even though fish wholesalers purchase almost eight percent of government stocks. Again, albeit a united coalition of Japanese fish wholesalers, success in lobbying for lower prices would prove difficult against the 'triumvirate' of business, bureaucratic and political establishments (Danaher, 1996).

Threat of Substitute Products

There is a medium threat of substitute products. Since the introduction of International Whaling Commission regulations there has been a growing threat of substitute products such as dolphin and porpoise meat which are passed off as whale meat (Ishihara & Yoshii, 2000). As retail prices can fetch extraordinary high prices of 3,500 yen (US \$35) per 100 grams for whale meat and 4,000 yen (US \$40) per 100 grams for some whale bacon there are two consequences (Greenpeace Japan, 1998-2005). The first is poaching and smuggling, which threatens to undermine the market for legal products (Greenpeace Japan, 1998-2005) and the second is a lowering of switching costs to other meats. Fresher higher quality products such as tuna, salmon and Kobe beef could be purchased at a lower cost. All firms compete by offering a substitute for another's product(s). "The more attractive the price performance alternative offered by substitutes, the firmer the lid on industry profits" (Porter, 1979).

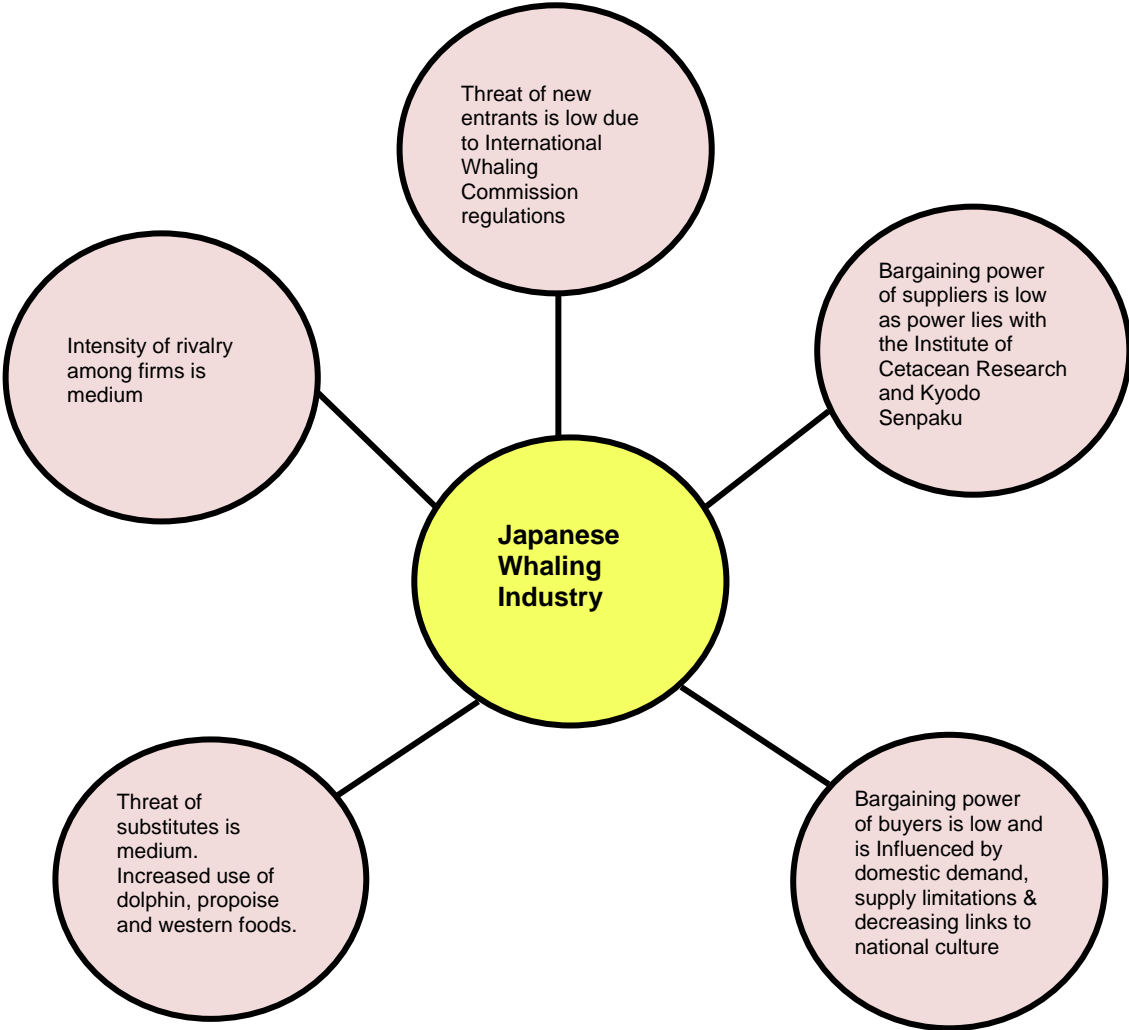
Japan consumes tuna and livestock produce as substitutes for whale meat, so as to include animal protein in their diet. The demand for tuna has therefore increased and has resulted in overfishing from other countries. Plunging global fish stocks, along with a growing taste for sushi in China and the West, make Japan very uneasy about its future access to fresh seafood. So holding a firm line on the sustainable harvesting of whales, the argument goes, can help stave off a larger fight over more important fishing rights down the road (Sekiguchi, 2007).

Due to International Whaling Commission sanctions, the whaling industry will always struggle to compete with substitute products like tuna, as whale meat is decreasing in popularity and at the same time, becoming more expensive. Given the limited availability and the fact that many young Japanese have not been brought up with whale meat, the current generation does not show much interest in consuming this product. However, stringent regulations also help to create a perceived uniqueness and delicacy. This can help to increase the demand for whale meat and generate a price premium. By maintaining this niche market, the role that whaling plays in the cultural identity of Japan is expected to keep the market for whale meat relatively healthy.

Rivalry among Competitors

The definition of competitors in this context is complex. On the one hand, Norway and Iceland do not really compete with the Japanese whaling industry and actually supplement Japan's limited quota of whale meat. From this viewpoint, these nations provide the opportunity to work as an industry cluster and lobby for resumption of commercial whaling. On the other hand, there is a coalition of anti-whaling nations threatening to stave off any attempts at resuming commercial whaling. As Masayuki Komatsu, Counsellor for the Fisheries Agency states whale meat 'does not sell well any more' (Greenpeace Japan, 1998-2005). The combination of slow growth in an industry that is highly criticised by the international community creates a substantial amount of rivalry. The Norwegian industry is Japan's primary competitor. In the past, the whaling industry in the two countries have remained separate. However, as the demand for whale products in Japan was quite high, Norway saw an opportunity to 'off-sell' to Japan, parts of whale that Norwegians do not use. Norway hunts Minke whales only for their meat, but in January of 2000 they announced that they would start exporting other whale bi-products (mainly blubber) to Japan (Bryant, 2000). This could pose a limited threat to the Japanese industry. Since most of the whaling costs are recovered from Norwegian consumers, Norway can actually sell these bi-products to Japan at highly discounted prices.

Figure 6: Summary of KARION Consultant's Report



Conclusion

The current economic crisis has demonstrated that global markets are truly integrated. The sub-prime mortgage crisis in the US housing industry has destroyed world financial markets and sent several countries into recession. In November 2008, economists stated that Japan was in recession after two quarters of negative growth. Global trade forms the lifeblood of several Japanese manufacturing industries such as automobiles and electronics. Japanese entrepreneurs have spent their entire life building powerful brands such as Honda, Toyota and Panasonic. Many Japanese wonder whether the rigid pro-whaling global strategies of the Japanese government will eventually result in a global consumer backlash against Japan and destroy its export markets. In addition, the new generation of environmentally conscious Japanese youth are growing increasingly uncomfortable with the rapid depletion of whales, which is seen by many as an endangered species. Many Japanese wonder whether the immediate financial rewards from whaling can really justify the significant long term economic and social risks.

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Discussion Questions:

1. Identify the most important factors in the macro-environment and discuss their impact on the Japanese Whaling Industry?
2. Do you believe that the tactics adopted by the Japanese to hunt whales are “cruel and inhumane”? What strategies can Japan adopt to deal with the allegations of cruelty?
3. Using Porter’s (1979) Five Forces Model, critically assess the Japanese Whaling Industry?
4. Based on the above analysis, do you believe that it is in Japan’s strategic interest to continue large scale Whaling? Justify your answer with a detailed explanation?
5. To what extent will commercial whaling impact the image of Japan and its long term ability to expand its business in the global market?

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