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Japan

Exporter Guide

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Report Highlights:
Japan continues to represent one of the best opportunities in the world for U.S. exporters of food products. The total food and drink market in Japan is huge, valued at around $664.63 billion. In 2013, the United States exported $13.89 billion worth of agricultural and related products to Japan. There exist tremendous opportunities for U.S. exporters who are willing to follow the strict Japanese regulations and keep up with the fast-moving trends in this market.

Post:
Osaka ATO

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Note: *US$1=Y103.10, the yearend exchange rate of 2013 (Dec.22 – 28, 2013), is used to convert the figures in yen to US dollars in this report unless otherwise mentioned.

*The export figure from the US is from USDA and the import figures are from Global Trade Atlas (Source: Japanese Finance Ministry). Therefore, there might be some discrepancies among the figures.

I. Market Overview

Japan continues to be one of the best opportunities in the world for U.S. exporters of food products. In 2013, the United States exported $12.93 billion worth of agricultural and fish products to Japan ($13.89 billion including forest products and other agricultural related products) . The total food and drink market in Japan is huge, valued at around $664.63 billion when the food retail sector and the food service sectors are combined. If you have a quality product that meets the demands of Japanese consumers, that can be produced and delivered competitively, and you have patience to research both the differences in consumer tastes and government regulations, it is possible to build an attractive market position in Japan.

1.Current Trends

Japan's market for high-value foods and beverages continues to change dramatically, with the latest trends focusing on functional, healthy and nutritious foods. While traditional menus and tastes still generally guide the average Japanese consumer's consumption habits, Western and other Asian ethnic cuisines are having a major impact in the market.

The Japanese consumers tend to be willing to accept high prices for quality and convenience. However, at the same time, the consumers, in general, demand good value in the products they purchase as well. Major supermarket chains are coping with this demand for value by introducing a wide variety of their own private store brands, while many restaurant chains are dealing with the situation by further reducing their prices in order to stay competitive in the industry.

As the Japanese population is expected to decline due to a low birth rate, the Japanese food market may weaken in the future. Food retailers and food service operators are competing for consumers on a number of fronts, including price, convenience, variety and safety. Some companies are seeking a way to survive in the industry through mergers and acquisitions or tie-ups with partners beyond their traditional business channels. However, as the market continues to segment and as the population gets older and wealthier, the opportunities for high quality, high value foods that meet the demand of the market will only increase.

2. U.S. Advantages and Challenges

The Japanese market offers a number of benefits to U.S. exporters, but it is not without difficulties.

Table 1. Advantages and Challenges

U.S. Advantages	U.S. Challenges
• U.S. food cost/quality competitiveness • Wide variety of U.S. food products • Reliable supply of U.S. agricultural products • Advanced U.S. food processing technology	• Increasing food safety concerns and demands for food production information among Japanese consumers • Long distance from Japan • Consumer antipathy toward biotech foods and most food additives

• Relatively low U.S. shipping costs • Science-based U.S. food safety procedures • Growing Japanese emulation of U.S. cultural and food trends • Japanese food processing industry seeking new ingredients • Changes in the Japanese distribution system, becoming similar to that of the U.S. • Japan's dependence on foreign food supply	• Japanese preoccupation with quality • Consumers' preference for domestically produced products • High cost of marketing in Japan • Complicated regulations and laws • High duties on many products • Increasing competition with China and other food exporting countries • Importers expect long-term involvement and commitment.

II. Exporter Business Tips

1. Tips to Deal with Japanese Buyers and Traders

Japanese business people, no matter how Western they may appear, do not always approach business relations in the same way as Americans. Some differences are simply due to the language barrier, others are due to differences in deeply held traditions and practices. To help bridge these gaps, we suggest that you:

- Speak slowly and clearly, even if you know that your business counterparts speak English.
- Use clear, simple words and expressions when writing in English.
- Use e-mail and fax, rather than telephone, whenever possible.
- Make appointments as far in advance as practical.
- Carry plenty of business cards (*meishi*) and present them formally at each new introduction—and be sure they have your personal information in Japanese on the back.
- Be on time for all meetings; the Japanese are very punctual.
- Be braced for negotiations which require a number of meetings and probably several trips to reach an agreement.
- Be aware that in Japanese, "*Hai*," (yes) may mean, "I understand," not, "I agree."
- Limit the discussion of business at evening meals, or when drinking with new Japanese counterparts; these occasions are for getting to know one another and building trust.
- Be aware of major Japanese holiday and business break periods, e.g., the New Year holiday (approximately from December 30 to January 3); Golden Week, a combination of national holidays (April 29 - May 5); and *Obon*, an ancestor respect period lasting for a week in mid-August during which many companies close and business people take vacations.

2. Consumer Preferences, Tastes and Traditions

These ideas may help you consider your product approach.

Japanese consumers:

- Are highly concerned about food safety and traceability – commonly used terms are *anzen* and *anshin* that respectively mean ‘safety’ and ‘peace of mind’;

- Place great importance on quality—producers that fail to recognize this will not succeed;
- Appreciate taste and all of its subtleties—and will pay for it;
- Are well-educated and knowledgeable about food and its many variations;
- Are highly brand-conscious—a brand with a quality image will sell;
- Care a great deal about seasonal foods and freshness—promotion of these characteristics can significantly build product sales and value;
- Are increasingly health-conscious;
- “Eat with their eyes” and often view food as art. A food product’s aesthetic appearance—on the shelf, in the package, and on the table—is important in building consumer acceptance;
- Have small families and homes with minimal storage space, thus, large packages are impractical, although stores such as Costco continue to do well, reflecting the increasing preference for value, not just quality.

3. Export Business Reminders

Below are some important reminders about exporting to Japan:

- Limit the number of your trading partners, but try to avoid exclusive agreements with one company.
- Use metric terms. Quote price in CIF (cost, insurance and freight), unless the importer requests FOB (Free on Board).
- Price competitively; exclude U.S.-based costs such as domestic sales, advertising, marketing, etc.
- Be patient regarding requests for information on ingredients, production process and quality assurance. Ensure that all the information is correct and respond with diligence and in a timely manner.
- Use letters of credit to reduce risk.
- Hedge export values with your U.S. bank if you are concerned about exchange rate risk.
- Set up wire transfers for payments.

4. Food Standards and Regulations

U.S. exporters doing business in Japan for the first time often find Japanese food standards difficult to deal with. Here are a few tips:

- Read the USDA’s “Japan: Food and Agricultural Import Regulations and Standards (FAIRS) Country Report.” This concise document, covering food laws, labeling, packaging, import procedures, and other key regulations, should be a helpful guide for all food exporters. It is updated annually. (At the URL, http://gain.fas.usda.gov/Pages/Default.aspx, click “search reports,” and set your search to select “Country: Japan”, and “Categories: FAIRS Subject Report” under “Exporter Assistance”.)
- Read other USDA Japan reports and information. Go to the USDA Japan homepage (http://www.usdajapan.org) and click the "Reports" menu button to get market information and

reports.

- Read the Japan Food Sanitation Law. Make sure that the labeling you plan to use meets Japanese requirements. (http://www.jetro.go.jp/en/reports/regulations/)
- Check the JETRO report, "Specifications and Standards for Foods, Food Additives, etc. under the Food Sanitation Law" (http://www.jetro.go.jp/en/reports/regulations/). This summarizes specific technical import procedures especially for processed food products.
- Carefully check your food additive admissibility. (e.g., preservatives, stabilizers, flavor enhancers). For information on U.S. laboratories approved by the Japanese Government, visit http://www.mhlw.go.jp/topics/yunyu/5/dl/a3.pdf.
- Verify all relevant import requirements with your Japanese customers. They will normally have updated information on Japanese regulations.
- Provide a detailed list of product ingredients to your Japanese partners to allow them to verify their acceptability. Do not assume that U.S. approval means Japanese approval.
- For organic foods in the United States, make sure you obtain USDA's National Organic Program approval. Then, working with your importer, you can register your product under the Japan Agriculture Standard (JAS). Or you can directly have your product certified under JAS Organic. (http://www.ams.usda.gov/AMSv1.0/nop)
- After you have completed the above steps, check with the Agricultural Affairs Office at the U.S. Embassy in Tokyo (agtokyo@fas.usda.gov) with any remaining questions on issues such as standards, tariffs, regulations, labeling, etc. Depending on content, the ATO Japan offices may also be able to directly respond to your inquiries.

5. Import and Inspection Procedures

Your job is not complete when your product has been ordered and shipped. You still must get it through Japanese customs and port inspections. The points outlined below should aid in this process:

- As noted in section 4, review the "Japan: Food and Agricultural Import Regulations and Standards (FAIRS) Country Report" to get a better understanding of these procedures

- Please note the basic import procedure in Japan described below.

  - Importers are required to submit "Import Notification" to a Quarantine Station of the Ministry of Health, Labor and Welfare (MHLW). At the Quarantine Station, food sanitation inspectors examine the document to see the foods and products to be imported conform to the Food Sanitation Law. Then, if judged necessary, inspection will be carried out. Once the products are confirmed that they are in compliance with the Japanese food regulations, a certificate of notification is issued, allowing the entry in Japan.

  - The article 27 of the Food Sanitation Law states that "those who wish to import food, food additives, apparatuses or containers/packages for sale or for use in business shall notify the Minister of Health, Labor and Welfare on each occasion as prescribed by the Ministerial Ordinance."

- The MHLW's Ordinance No. 23 requires the submission of Import Notification prior to the import of products with information including materials, ingredients and manufacturing method in case processed food products are to be imported. It is customary that the import notification will be accompanied by a list of ingredients and a process flow chart issued by the manufacturer.

- For details on the procedures, please visit the following MHLW site: http://www.mhlw.go.jp/english/topics/importedfoods/1.html

- Confirm the specific tariffs that apply to your product before pricing to potential customers. Remember that tariff rates in Japan are calculated on a CIF basis and that Japan adds an 8%*consumption tax to all imports. Japan tariff rates can be found here: http://www.customs.go.jp/english/tariff/
- Do not send samples for preliminary checking without an actual request from your importer. Be aware that many parcel delivery companies recently adopted the policy of not handling any animal or plant quarantine items (including dried fruit and nuts) due to possible delay in delivery caused by quarantine inspection. Make sure the delivery service you are going to use deals with your product before actually sending it to Japan.
- Recognize that customs clearance officials' application of the law and interpretation of regulations may differ from one port to another. Thus, the least expensive or most convenient port may not be the best choice. Check with your local customer or in-country agent representative.
- Be sure to complete all documentation thoroughly and accurately.
- Send copies of documentation in advance especially for the first-time shipments, which can assist your importer in getting timely release of your cargo from customs and clarifying matters with quarantine officials.
- For fresh products, check phytosanitary and sanitary requirements in advance and obtain proper USDA inspections in the United States (www.aphis.usda.gov (for plant products and pet food) and www.fsis.usda.gov for meat and poultry products).
- Approval for biotech agricultural products and ingredients is regulated by the Japanese government. If these products are intended for consumer consumption, they will also require specific labeling to be admitted to Japan.
- Make sure you have the proper import documents accompanying shipment: 1) Import Notification; 2) Health Certifications; 3) Results of Laboratory Analysis; 4) Manufacturer's Certification showing ingredients, additives and manufacturing process. (Note: Products imported for the first time may require more documentation.)

III. Market Sector Structure and Trends

One of the exporter's important strategic decisions—other than those dealing with the product itself—is how to position the product and get it to the Japanese consumer, i.e. through retail, food service, and/or food processing channels. The following is the brief description of the three sectors.

1. Retail Sector

Japan's food retail market generated about $432.77 billion (44.62trillion yen) in 2013, 1.35% up from the previous year. Although it is a huge market, it is highly fragmented. Unlike in North America and the EU, Japan's retail food sector is characterized by a relatively high percentage of specialty/semi-specialty stores, including "mom-and-pop" stores and local grocery stores. Such small retailers, however, are losing ground to large general merchandise stores (GMS), supermarkets (SM), and convenience stores (CVS). These three categories offer excellent opportunities to U.S. food exporters although there is severe competition with suppliers of other countries as well as domestic manufacturers.

Food retailers in Japan are classified into following major segments. The characteristics of these channels are listed in the table below:

Table 2. Retail Store Opportunities for U.S. Food Exporters

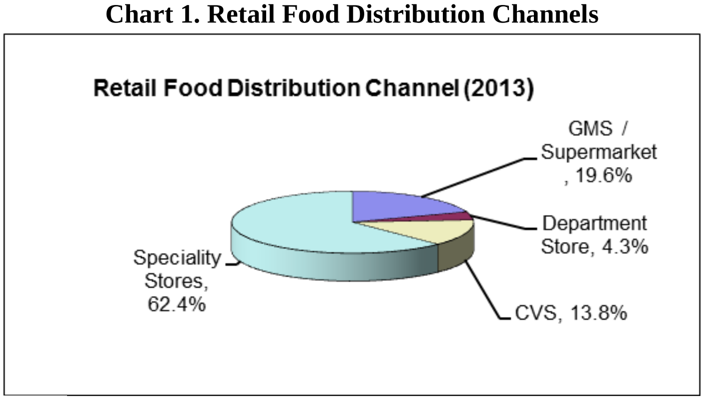
	GMS General Merchandise stores	**SM** Supermarkets	**Department Stores**	**CVS** Convenience stores	**Specialty Stores**	**Semi Specialty Stores**
Share (2013)	19.6%		4.3%	13.8%	62.4%	
Future growth expectations*	M	M	L to M	M	D	D
Receptivity to imports**	M to H	M to H	M to H	M to H	L to M	L to M
Suitable for:						
Established brands	M to H	M to H	H	M	M	M
High quality/high price	M	M	H	M to H	M	M
Good quality/low price	H	H	M	H	M	M
New products	H	H	H	H	M	M

*Growth expectations: H - high; M - moderate; L - low; D - decline

**Receptivity ratings: H - high; M - medium; L – low

Sources: METI Commercial Census (2013); ATO estimates on import growth and receptivity.

Chart 1. Retail Food Distribution Channels



Source: METI Commercial Census 2013

General Merchandise Stores (GMS)

Japan's general merchandise stores (GMS), like supercenters in the United States, offer shoppers the convenience of one-stop shopping for groceries, perishables, clothing, household goods, furniture, and electrical goods. Food sales, which typically used to make up one third of the total sales at GMS's, now reach a half of the total sales or even more at some chains.

GMS's are operated by major national chains that have nationwide networks with hundreds of outlets and central purchasing is typical. GMS's are generally receptive to foreign products, although they often demand product modification to suit market tastes and preferences. They often purchase foreign products via trading companies. Inventory risks, long lead times, and communication problems make GMS buyers hesitant to import products directly. However, as Japan's retail market becomes more competitive, some GMS's are opting for direct purchase and offer excellent opportunities to U.S. food exporters.

Supermarkets (SM)

Supermarkets (SM) stores are smaller in size than GMS's and are more specialized in food and household goods. On average, food items account for 70% or more of the total sales of these stores. Supermarkets are facing higher purchasing costs than GMS's. They are seeking a way to survive in the market through product/service differentiation, private brand development, and global sourcing. To gain economies of scale, regional supermarkets are forming alliances, such as joint merchandising companies, with non-competing retailers. Thus, although individual retailers are not large enough to engage in direct offshore sourcing, through joint merchandising companies, they offer good opportunities to U.S. food exporters. These retailers carry imported products particularly as a means to differentiate themselves from other competing stores in their region.

Department Stores (DS)

Department store sales have been declining in recent years due to increasing competition with GMS's and other retailers. Food sales at department stores account for less than 5% of the total retail food sales. Nevertheless, department stores offer excellent opportunities for imported high-end food products and they are an under-exploited channel for U.S. exporters. Most department stores have extensive basement concessions (i.e., small, independently operated retail stands), otherwise known as 'depachikas'. There are also outlets operated by department stores themselves, offering an opportunity for U.S. exporters to launch pilot stores or to conduct marketing trials. Department stores provide a showcase of imported, novelty, and high-end products and thus provide U.S. exporters of high-quality and fancy foods with an excellent opportunity to showcase their products.

Convenience Stores (CVS)

Convenience stores (CVS) are an extremely important sales channel in Japan. They have small floor space, about 100 m^2 on average, and typically stock about 3,000 products. Convenience stores derive their competitive advantage from high turnover and efficient supply chains. Thus, short lead-time and nationwide distribution are essential in dealing with major CVS operators. While this presents a significant challenge to many overseas companies, indirect business with CVS, nevertheless, offers huge potential to them. Global sourcing of ingredients and raw materials, especially for the use of fast food, has become more popular. CVS operators not only work with consumer product manufacturers but also with trading firms and ingredients manufacturers. In order to differentiate themselves from their competitors, major CVS operators are constantly searching for novelty items and new concepts, which offer good opportunities to U.S. food exporters.

Local General and Specialty Stores

Predominantly, Japan's food retail trade still consists of local specialty stores and grocery stores, most of which are small, family-run operations. These retailers offer limited market potential to exporters, as they are served by secondary or tertiary wholesalers, which, in turn, are supplied by Japan's major wholesalers. However this sector has been shrinking as the food market has become more competitive. There are only a small group of retailers who specialize in imported products in Tokyo and other metropolitan areas who may be able to offer opportunities to U.S. exporters.

Home Meal Replacement (HMR)

As in North America, the growth of the HMR sector is one of the most important developments in the Japanese food sector in recent years. Examples of popular products in this sector are prepared foods sold at supermarkets, takeout meals sold at specialty stores, and various readymade foods sold at convenience and department stores. Thus there is some overlap with the channels outlined above. The sector is expected to become an important market as the number of working women, single households and the elderly rises.

The sector consists mostly of small regional companies and is now going through a series of consolidation. Larger companies in the sector are suppliers for major supermarket operators, convenience stores and tenants in department stores. At this moment, there are a number of constraints facing U.S. exporters in this sector. High-volume buyers are still relatively rare; global sourcing and direct transactions with foreign suppliers are also uncommon. In addition, relatively high turnover for menu items often makes companies hesitant about global merchandising. Nevertheless, HMR's are potentially an ideal customer for U.S. food exporters, especially for those who are willing to meet stringent cost, quality, and size specifications.

There is a separate report on Retail Food Sector in Japan. To read this report, please visit: http://gain.fas.usda.gov/Pages/Default.aspx, and click "search reports," and set your search to select "Country: Japan," and "Categories: Retail Foods" under "Exporter Assistance".

2. HRI Food Service Sector

The food service sector generated $231.86 billion (23.90 trillion yen) in sales in 2013. The sector showed a 2.9% growth from the previous year, following 1.5% growth recorded in 2012. The sector was adversely affected by the Great Earthquake in March 2011 as consumers refrained from dining out and traveling following the earthquake and tsunami. However, they started dining out and traveling again in 2012 and this upward trend continued in 2013.

This sector can be divided into four major segments by business category: 1) restaurants; 2) hotels and travel-related facilities; 3) bars and coffee shops; and 4) institutional food service companies. The following is the update by category.

Table 3. Food Service Opportunities for U.S. Food Exporters

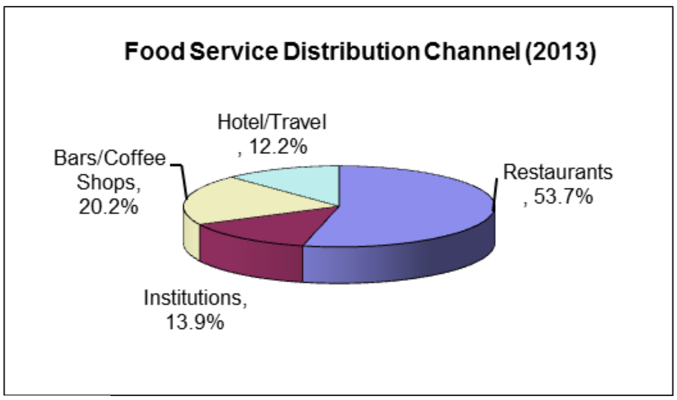
	Restaurants	Hotels/ Travel related	Bars/ Coffee shops	Institutional
Sales Share (2013)	53.7%	12.2%	20.2%	13.9%
Future growth expectations*	M to H	H	M	M
Receptivity to imports**	H	H	M to H	H
Especially suitable for:				
High quality/high price	M to H	H	M	L
Good quality/low price	H	H	H	H
New products	H	H	H	H

*Growth expectations: H-high; M-moderate; L-low; D-decline

**Receptivity ratings: H-high; M-medium; L-low

Sources: Food Service Industry Research Center; ATO estimates of import growth and receptivity.

Chart 2. Food Service Distribution Channel



Source: Food Service Industry Research Center

Restaurants

The restaurant segment, the leading segment of the HRI food service sector, generated approximately US$ 124.61 billion in sales in 2013, 3.0% up from the previous year. The growth is considered to come from continued reaction to the restrained consumption after the Great Earthquake in 2011.

The restaurant segment is highly fragmented and most restaurants are small. However, small family-owned restaurants have been disappearing due to increased competition against large chain restaurants as well as against HMR.

Major family restaurant chains are becoming increasingly important for international suppliers. As they compete primarily on price, they are active in global sourcing. These chains, thus, represent a significant opportunity for U.S. food exporters. Chain restaurants are particularly interested in semi-processed or precooked foods. Premixed ingredients, seasonal fruits and vegetables, specialty sauces and seasonings, and desserts are particularly attractive products for chain operators.

Japan has a large and competitive fast food segment made up of both domestic and overseas operators. Generally, fast food restaurant operators are volume buyers of specific raw materials. In addition to low cost, suppliers must provide a stable supply of products at a specific quality to compete effectively in this segment. Exporters can approach most large restaurant chains directly but for the smaller chains, exporters must build relationships with trading companies or major food service wholesalers.

Hotels and Travel-Related Facilities

The recovery of this segment was notable with hotels growing at 4.6% from the previous year and travel-related growing at 0.9%. Consumers, who had refrained from traveling after the Great Earthquake in 2011, started traveling, reducing vacancy rates at hotels.

Major hotels are attractive markets for U.S. exporters. They are more oriented toward Western food and frequently have “food fair” promotions featuring a variety of countries’ cuisines. Exporter’s challenge lies in developing effective distribution channels to reach them. Hotels offer high consumer visibility and thus promotional value for exporters. Highlighting the fact that a particular exporter’s product is used by a major upscale hotel chain, for example, is a good way to promote the product to retailers and other prospective buyers.

Railway companies and domestic airlines operate kitchens in Tokyo and Osaka, while the overseas airlines tend to use contract caterers. These Japanese companies tend to feature Japanese cuisine. But there are companies who are actively procure imported foods as well.

Theme parks are also an important part of the sector. Restaurants and snack outlets at both Tokyo Disneyland and DisneySea, as well as Universal Studios Theme Park, for example, draw millions of visitors every year. Other theme parks around the country also attract thousands of visitors a day and offer opportunities to U.S. food exporters.

Bars and Coffee Shops

These establishments account for 20.2% of the total food service sales and are a major market for foreign beverages and snack foods. The sales from the segment showed 3.9% increase in 2013, following 1.1% decrease in the previous year. The segment finally showed a recovery in 2013, lagging behind the restaurant sector and the hotel-travel related sector. The establishments in this bar and coffee shop segment tend to be small and difficult to reach. The best way to reach these outlets is to work with the large food distributors in Japan.

Institutional Food Markets

The institutional market comprised of cafeterias at factories, offices, hospitals and schools, generated $32.13 billion in 2013, 0.2% down from the previous year. A reduction in school meals due to a smaller number of school children was partly behind this decrease of the segment.

The cafeteria operations of these institutions are typically served by contract caterers. Building relationships with caterers through food service wholesalers is, therefore, essential to crack this market. The sector offers huge market potential to U.S. exporters, as the most important criterion for these institutional suppliers is cost competitiveness.

Long-term prospects are brighter as higher demand from contract caterers, serving the hospital and social welfare segments, is expected to grow due to an increasing aging population.

There is a separate report on HRI Food Sector in Japan.
Please visit: http://gain.fas.usda.gov/Pages/Default.aspx, and click "search reports," and set your search to select "Country: Japan," and "Categories: Food Service – Hotel Restaurant Institutional" under "Exporter Assistance".

3. Food Processing Sector

Food manufacturers in Japan offer a number of opportunities to U.S. exporters and they have the capacity to buy the following types of products from overseas:

- Ingredients for production in Japan;
- Finished products to be sold under their own labels;
- Finished products to be sold under the exporter's brand, but distributed through the importer's channels.

Dealing with food processors offers advantages as follows:

- They often buy in large volumes;
- They have sophisticated distribution systems;
- They have a good understanding of their suppliers' businesses.

Exporters should be prepared for requests from Japanese manufacturers, as they are very demanding regarding the release of data on product quality, origin of ingredients, and other related information. In large part, regulations from the Government of Japan require manufacturers to protect themselves from risks. Such information is also increasingly important because of growing concerns about food safety and traceability among Japanese consumers. U.S. exporters must be prepared to deal positively and promptly with these issues to compete in this market.

There is a separate report on Food Processing Sector in Japan. To read it, please visit: http://gain.fas.usda.gov/Pages/Default.aspx, and click "search reports," and set your search to select "Country: Japan," and "Categories: Food Processing Ingredients" under "Exporter Assistance".

4. E- Commerce and mail-order

Internet users in Japan reached 1.48 million with a 79.1% penetration rate at the end of 2011. With a rapid increase in the Internet users, online shopping is becoming more and more popular among the Japanese.

According to Japan Direct Marketing Association, the total mail-order sales including e-commerce reached $56.84 billion (5.86 trillion yen) in FY2013 (April to March), 8.3% up from the previous year. While the sales growth accelerated from 6.3% in FY2012 to 8.3% in FY2013, the sector recorded positive growth for 15 years in a row. The sales were doubled in a decade and e-commerce has been the main growth engine in the mail order sales. While online sales are often dominated by electronics and clothing, food, in particular natural & organic food and health food, is an important category within the area of e-commerce .

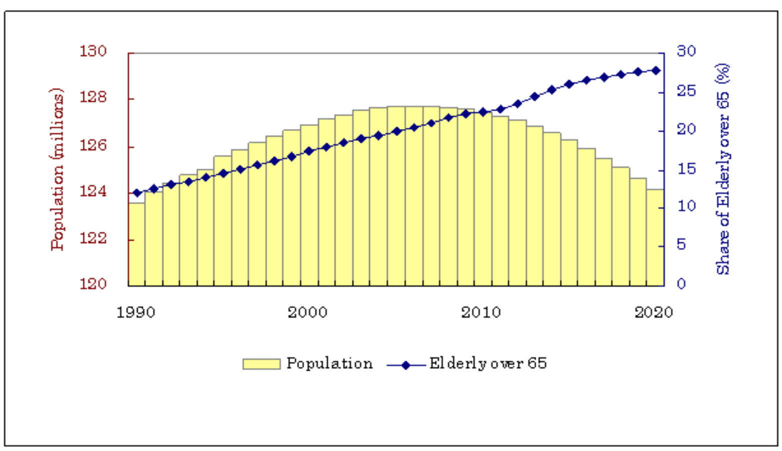
According to the Japanese Ministry of Internal Affairs and Communications, online sales are expected to continue to expand as customers cite that internet shopping has many advantages such as that it can be done 24/7, saves time with no transportation cost, makes comparing products and prices easy, and allows for a larger selection. Now major supermarket chains are expanding their service through the Internet as well.

5. Population Trends

Japan's population has undergone dynamic shifts in age proportions since the 1980's with decreasing number of births and a growing aging population. Until recently, Japan had been experiencing small but steady annual population growth. However, Japan experienced a 0.01% population decline in 2005 for the first time since 1988 when Japan began compiling population statistics. According to the national survey in 2013, Japan's population was estimated at 127.30 million, 0.17% down from the previous year.

By the year 2050, Japan's population is predicted to decrease to 95 million, with the ratio of individuals over 65 climbing from 7%, in the 1970's, to 40%. While one may consider this to be negative, the older population in Japan enjoys a high standard of living and is relatively wealthy. The aging of Japan can present opportunities for high value, high quality products.

Chart 3. Japan's Population Growth and Expected Decline



Source: National Institute of Population and Social Security Research

IV. Best High-Value Import Prospects

The following presents a list of products, which are considered to hold the “best” import prospects for 2015, based on a number of criteria, including high volume, demonstrated growth, and U.S. competitiveness in the Japanese market.

Table 4. Best Import Prospects

Product Category	HS Code	2013 Market Size	2013 World Imports	5 year Avg.* Annual Import Growth (2009-2013) (volume)	Import Tariff Rate	Key Constraints to Market Development	Market Attractiveness for U.S.A.
Fresh Fruit Sector: World Import Value (2013):$ 1,998 million							
Melon	0807.19	Volume: 189,200 MT (2012)	World volume: 32,721 MT value: $33.46 million US volume: 7,321MT value: $6.45 million	Volume growth: World: 2.75% US:1.82%	6%	Imported melons are offered as supplementary to local production and demand varies depending on the local supply. US melon season (July to October) is the same as the Japanese. Mexico has increased its exports by supplying when local production is not available.	Local production has been in decline while the demand, particularly in the processing sector (for packaged cut fruits) stays strong.
Fresh Vegetable Sector: World Import Value (2013):$ 980 million							
Head Lettuce	0705.11	Volume: 539,600 MT (2012)	World volume: 11,976 MT value: $14.30 million US volume: 2,635 MT value: $3.56 million	Volume growth: World: 40.95% US:26.32%	3%	High risk of fumigation upon arrival at the Japanese port has kept most importers from trying to import lettuce. Fumigation renders head lettuce unsuitable to use. Japanese users and consumers prefer local lettuce, and imported lettuce has been used when local one is in short supply.	The Japanese cut vegetable market has been growing, and there is a greater need for year-round stable supply in the processing sector. US lettuce (high-quality, high-yields, a stable supply) is suitable for processing.
Lettuce (romaine)	0705.19	Volume: 46,900 MT (2010)	World volume: 1,120 MT value: $1.99 million US volume: 900 MT value: $1.59 million	Volume growth: World: 56.86% US:48.51%	3%	High risk of fumigation upon arrival at the Japanese port has kept most importers from trying to import lettuce. Romaine lettuce, especially the high-quality and unique texture of the US-grown products, is not well known among Japanese users and consumers.	The Japanese cut vegetable market has been growing, and there is a greater need for year-round stable supply in the processing sector. US lettuce (high-quality, high-yields, a stable supply) is suitable for processing.

Sausage and Prepared Meat Sector **World Import Value (2013):$ 3,207million**							
Sausage	1601	Total Supply volume: 354,280 MT	World volume: 47,292 MT value: $252.8 million US: volume: 12,035 MT value: $ 63.2 million	Volume growth: World : 4.02% US: 5.95%	10%	No major trade constraints.	Majority of domestically produced sausages in Japan use imported frozen pork raw material cuts such as picnic plus some imported seasoned ground pork as raw materials. Within the Japanese market, there appears to be a growing niche for imported specialty sausages (finished products) that meet the needs of the food service industry. Japan's anticipated 2015 regulatory change concerning collagen casings for sausages is expected to expand the scope of export opportunities and options for U.S. sausage manufacturers.
Fresh/Chilled/Frozen Red Meat Sector: **World Import Value (2013):$ 7,470million**							
Chilled/Frozen Beef Cut	0201, 0202	Total Supply volume (Boneless Equivalent): 974 million MT	World volume (Customs Clearance Basis): 534,255 MT value: $ 2.72 billion US Volume: 186,056 MT value: $1.04 billion	Volume growth: World 2.65% US: 28.06%	38.5%	Since February 1, 2013, exports have been limited to products approved under LT-30 QSA. In April 2014, scalded offal items (stomachs, small intestines and blood vessels) were approved for export to Japan; further processed beef products (beef jerky, roast beef, soup stocks, etc.) remain ineligible.	Beef products not often utilized in the United States (including short plate, hanging tender, skirt meat, and offal items) command a relatively high price in the Japanese market. When Japan re-opens market access to processed beef products, there will be additional market opportunities for further processed products.
Beef Offal, Tongue, etc.	0206.10, 0206.21, 0206.22, 0206.29	Not available	Total Import volume: 59,164 MT value: $ 531.1 million US: volume: 30,794 MT value: $315.0 million	Volume growth: World: 11.37% US: 33.4 %	12.8%	As referenced above.	Japan continues to be a growing market for U.S. beef tongue exports.
Cheese Sector: **World Import Value (2013):$ 1,118million**							
Cheese	0406	Total Supply volume: 300,000 MT	Total Import volume: 236,191 MT value: $ 1.12 billion	Volume growth: World: 6.41%	Natural Cheeses: 22.4% - 29.8% Processed	Japan still maintains a high tariff on imported processed cheeses (40%) to protect domestic dairy manufacturers.	Over the past five years, the United States has become a competitive supplier of natural cheeses to Japan (after Australia and New

			US: volume: 30,322 MT value: $146 million	US: 44.87 %	Cheese: 40%		Zealand). The food service industry is the primary customer of American natural cheeses, especially those used for shredding for pizzas and so on.
Tree Nut Sector: World Import Value (2013):$ 540 million							
Walnuts	0802.31 0802.32	Volume: 11,427 MT	World volume: 11,427 MT value: $121.23 million US volume: 11,085 MT value: $117.68 million	Volume growth: World:6.56 % US: 7.24%	10%	There is almost zero production of walnuts in Japan.	U.S. almost dominates the import of walnuts to Japan, but the market demands are increasing due to the health benefits of nuts.
Sweet Almonds	0802.11 0802.12	Volume: 31,924 MT	World volume: 31,924 MT value: $224.05 million US volume: 31,500 MT value: $219.99 million	Volume growth: World: 7.89% US: 7.91%%	4%	There is almost zero production of almonds in Japan.	U.S. almost dominates the import of almonds to Japan, but the market demands are increasing due to the health benefits of nuts.

Sources: Global Trade Atlas; Ministry of Agriculture, Forestry and Fisheries; Ministry of Economy, Trade and Industry; Ministry of Finance.

*Note: 5-year avg. annual growth is the compound annual growth rate from 2009 to 2013.

V. Key Contacts

The following tables provide information on key contacts in Japan.

Table 5: U.S. Government

Organization Name	Telephone/Fax URL/E-mail	Address
Agricultural Trade Office Tokyo American Embassy, Tokyo	Tel: 81(0)3-3224-5115 Fax: 81(0)3-3582-6429 www.usdajapan.org atotokyo@fas.usda.gov	1-10-5 Akasaka Minato-ku, Tokyo 107-8420
Agricultural Trade Office Osaka American Consulate-General, Osaka	Tel: 81(0)6-6315-5904 Fax: 81(0)6-6315-5906 www.usdajapan.org atoosaka@fas.usda.gov	2-11-5 Nishitenma Kita-ku, Osaka 530-8543
Agricultural Affairs Office, American Embassy, Tokyo	Tel: 81(0)3-3224-5105 Fax: 81(0)3-3589-0793 agtokyo@fas.usda.gov	1-10-5 Akasaka Minato-ku, Tokyo 107-8420
American Embassy Tokyo, Japan	Tel: 81(0)3-3224-5000 Fax: 81(0)3-3505-1862 http://tokyo.usembassy.gov/	1-10-5 Akasaka Minato-ku, Tokyo 107-8420

Animal and Plant Health Inspection Service (APHIS)	Tel: 81(0)3-3224-5111 Fax: 81(0)3-3224-5291 www.aphis.usda.gov	1-10-5 Akasaka, Minato-ku, Tokyo 107-8420
FAS Washington	www.fas.usda.gov	1400 Independence Ave., SW Washington, DC 20250
USDA Washington	www.usda.gov	1400 Independence Ave., SW Washington, DC 20250

For the information on U.S. State Government Offices in Japan, please visit:
http://www.asoajapan.org/eng/index.html

Table 6: U.S. Trade Associations and Cooperator Groups in Japan

Organization Name	Telephone/Fax URL	Address
Alaska Seafood Marketing Institute	Tel: 81(0)3-3225-0008 Fax: 81(0)3-3225-0071 www.alaskaseafood.org	International Place 26-3 Sanei-cho, Shinuku-ku, Tokyo, 160-0008
American Hardwood Export Council	Tel: 81(0)6-6315-5101 Fax: 81(0)6-6315-5103 http://www.ahec-japan.org/	American Consulate General 10F 2-11-5, Nishitenma Kita-ku, Osaka 530-0047
American Peanuts Council	Tel: 81(0)3-3221-6410 Fax: 81(0)3-3221-5960 www.usdec.org	Seibunkan Bldg., 5F 1-5-9, Iidabashi Chiyoda-ku,Tokyo, 102-0072
American Pistachio Growers	Tel: 81(0)3-3403-8288 Fax: 81(0)3-3403-8289 http://www.westernpistachio.org	1-26-4-7C Minami Aoyama Minato-ku, Tokyo 107-0062
American Softwood	Tel: 81(0)3-3501-2131 Fax: 81(0)3-3501-2138 http://www.americansoftwoods.com/	Aios Toramp,pm 9F 1-6-12 Nishishimbashi, Minato-ku, Tokyo 107-0003
Blue Diamond Growers	Tel: 81(0)3-5226-5601 Fax: 81(0)3-5226-5603 www.bluediamond.com	4-8-26 Kojimachi Chiyoda-ku, Tokyo 102-0083
California Fig Advisory Board	Tel:81(0)3-3560-1811 Fax: 81(0)3-3560-1813 http://californiafigsjapan.com/	4-14-14-2912 Akasaka Minato-ku, Tokyo 107-0052
California Pomegranate Tokyo PR Office	Tel: 81(0)3-5269-2301 Fax: 81(0)3-5269-2305 http://www.pomegranates.jp/	Shinjukugyoenmae Annex 6F 4-34 Yotsuya Shinjuku-ku, Tokyo 160-0004
California Prune Board	Tel: 81(0)3-3584-0866 Fax: 81(0)3-3505-6353 www.californiadriedplums.org http://www.prune.jp/	Pacific Bldg.,3F 1-5-3 Higashiazabu Minato-ku, Tokyo 106-0044
California Table Grape Commission	Tel: 81(0)3-3221-6410 Fax: 81(0)3-3221-5960 www.tablegrape.com	Seibunkan Bldg., 5F 5-9, Iidabashi, 1-chome, Chiyoda-ku, Tokyo, 102-0072
California Walnut Commission	Tel: 81(0)3-3505-6204 Fax: 81(0)3-3505-6353 www.walnuts.org http://www.californiakurumi.jp/	Pacific Bldg.,3F 1-5-3 Higashiazabu Minato-ku, Tokyo 106-0044
Cotton Promotion Institute, Japan	Tel: 81(0)6-6231-2665 Fax: 81(0)6-6231-4661 http://www.cotton.or.jp/	5-8 Bingomachi 2-chome Chup-ku, Osaka 541-0051
Dairy Export Council, U.S.	Tel: 81(0)3-3221-6410 Fax: 81(0)3-3221-5960 www.usdec.org	Seibunkan Bldg., 5F 1-5-9, Iidabashi Chiyoda-ku,Tokyo, 102-0072

Florida Department of Citrus	Tel: 81(0)3-3584-7019 Fax: 81(0)3-3582-5076 www.floridajuice.com	Residence Viscountess, Suite 310 1-11-36 Akasaka Minato-ku, Tokyo 107-0052
Food Export – MIDWEST/NORTHEAST	Tel: 81(0)3-3221-6410 Fax: 81(0)3-3221-5960 http://www.foodexport.org/	Seibunkan Bldg., 5F 1-5-9, Iidabashi Chiyoda-ku,Tokyo, 102-0072
Grains Council, U.S.	Tel: 81(0)3-6206-1041 Fax: 81(0)3-6205-4960 www.grains.org / http://grainsjp.org/	Toranomon Denki Bldg No.3, 1-2-20 Toranomon Minato-ku, Tokyo 105-0001
Hawaii Papaya Industry Association	Tel: 81(0)467-81-3921 Fax: 81(0)467-23-6987 http://www.hawaiipapaya.com/	Otani Bldg. #12. 2-11-11 Komachi Kamakura, Yokohama 248-0006
Meat Export Federation, U.S.	Tel: 81(0)3-3501-6328 Fax: 81(0)3-6205-7330 www.americanmeat.jp	Toranomon Denki Bldg., No.3, 1-2-20 Toranomon Minato-ku, Tokyo 105-0001
Napa Valley Vintners Japan Office	Tel: 81(0)90-8487-8293 Fax: 81(0)3-3707-7308 http://www.napavintners.com/	7-14-3C1, Fukazawa Setagaya-ku, Tokyo
National Dry Bean Council	Tel: 81(0)3-3221-6410 Fax: 81(0)3-3221-5960 www.usdrybeans.com	Seibunkan Bldg., 5F 1-5-9 Iidabashi Chiyoda-ku, Tokyo 102-0072
National Watermelon Promotion Board	Tel: 81(0)3-3584-7019 Fax: 81(0)3-3582-5076 http://www.watermelon.org/	1-11-36 Akasaka Minato-ku Tokyo 107-0052
Northwest Cherry Growers	Tel: 81(0)3-4578-9389 Fax: 81(0)50-3488-4172 www.nwcherries.com	9F UCF Win Aoyama Bldg. 2-2-15 Minami Aoyama, Minato-ku, Tokyo 107-0062
Oregon Wine Board	Tel: 81(0)78-854-7270 Fax: 81(0)78- 854-7271 http://oregonwine.org/	2-15-6-302 Mikagegunge Higashinada-ku, Kobe 658-0048
Potato Board, U.S.	Tel: 81(0)3-3586-2937 Fax: 81(0)3-3505-6353 www.potatoesusa-japan.com	Pacific Bldg., 3F 1-5-3 Higashiazabu Minato-ku, Tokyo 106-0044
Poultry and Egg Export Council, USA	Tel: 81(0)3-3403-8288 Fax: 81(0)3-3403-8289 www.usapeec.org	1-26-4-7C Minami Aoyama Minato-ku, Tokyo 107-0062
Raisin Administrative Committee	Tel: 81(0)3-3221-6410 Fax: 81(0)3-3221-5960 www.raisins-jp.org	Seibunkan Bldg., 5F 1-5-9 Iidabashi Chiyoda-ku, Tokyo 102-0072
Rice Federation, USA	Tel: 81(0)3-3292-5507 Fax: 81(0)3-3292-5056 www.usarice.com http://www.usarice-jp.com/	M&C Bldg., 2-3-13 Kandaogawamachi Chiyoda-ku, Tokyo, 101-0052
Soybean Export Council. U.S.	Tel: 81(0)3-6205-4971 Fax: 81(0)3-6205-4972 www.americanmeat.jp	Toranomon Denki Bldg., No.3, 1-2-20 Toranomon Minato-ku, Tokyo 105-0001
Sunkist Pacific Ltd.	Tel: 81(0)3-3523-0717 Fax: 81(0)3-3523-0710 www.sunkist.com	New River Tower, 8F 1-6-11, Shinkawa Chuo-ku, Tokyo 104-0033
Washington Wine Commission	Tel: 81(0)78-854-7270 Fax: 81(0)78- 854-7271 http://www.washingtonwine.org/	2-15-6-302 Mikagegunge Higashinada-ku, Kobe 658-0048
Western Growers Association	Tel: 81(0)3-3991-3290 Fax: 81(0)3-3991-3290 www.wga.com	Uchino Bldg., #501 5-24-15 Toyotamakita Nerima-ku, Tokyo176-0012
Wheat Associates, U.S.	Tel: 81(0)3-5614-0798 Fax: 81(0)3-5614-0799 www.uswheat.org	Seifun Kaikan 9F 15-6 Nihonbashi Kabutocho Chuo-ku, Tokyo 103-0026

Wine Institute of California	Tel: 81(0)3-3707-8960 Fax: 81(0)3-3707-8961 www.wineinstitute.org	2-24-6-403 Tamagawa Setagaya-ku, Tokyo 158-0094

Table 7: Japanese Government and Related Organizations

Organization Name	Telephone/Fax URL	Address
Ministry of Agriculture, Forestry and Fisheries (MAFF)	Tel: 81(0)3-5253-1111 Fax: 81(0)3-3595-2394 www.maff.go.jp	1-2-1 Kasumigaseki Chiyoda-ku, Tokyo 100-8950
Ministry of Health, Labor and Welfare (MHLW)	Tel: 81(0)3-5253-1111 Fax: 81(0)3-3595-2394 www.mhlw.go.jp	1-2-2 Kasumigaseki Chiyoda-ku, Tokyo 100-8916
Japan External Trade Organization (JETRO)	Tel:81(0)3-3582-5511 www.jetro.go.jp	Ark Mori Bldg., 6F 12-32, Akasaka 1-chome, Minato-ku, Tokyo 107-6006
Zen-noh (JA)	Tel: 81(0)3-3245-7111 Fax: 81(0)3 3245 7442 http://www.zennoh.or.jp/about/english/index.html (English)	1-8-3 Otemachi Chiyoda-ku, Tokyo 100-0004
JETRO Atlanta	Tel: 404-681-0600 Fax:404-681-0713 www.jetro.org /	1050 Crown Pointe Pkwy, #1450, Atlanta, GA 30338
JETRO Chicago	Tel: 312-832-6000 Fax: 312-832-6066 www.jetro.org	One East Wacker Drive, Suite 600 Chicago, Illinois 60601
JETRO Houston	Tel: 713-759-9595 Fax: 713-759-9210 www.jetro.org	1221 McKinney Street, Suite 4141 Houston, TX 77010
JETRO Los Angeles	Tel: 213-624-8855 Fax: 213-629-8127 www.jetro.org	777 South Figueroa Street, Suite 2650 Los Angeles, CA 90017
JETRO New York	Tel: 212-997-0400 Fax: 212-997-0464 www.jetro.org	McGraw Hill Bldg., 42F 1221 Avenue of the Americas New York, NY 10020-1079
JETRO San Francisco	Tel:415-392-1333 Fax: 415-788-6927 www.jetro.org	575 Market Street, Suite 2400, San Francisco, CA 94105

Table 8: Japanese Associations - Food

Organization Name	Telephone/Fax URL	Address
All Japan Confectionery Assoc.	Tel: 81(0)3-3432-3871 Fax: 81(0)3-3432-4081 http://www.pcg.or.jp/english/index.html (English)	1-16-10 Shiba Daimon Minato-ku, Tokyo 105-0012
Japan Federation of Dry Noodle Manufactures Assoc.	Tel: 81(0)3-3666-7900 Fax: 81(0)3-3669-7662 www.kanmen.com	Seifun Meeting Hall 6F 15-6 Nihonbashi Kabutocho Chuo-ku, Tokyo 103-0026
Japan Pasta Assoc.	Tel: 81(0)3-3667-4245 Fax: 81(0)3-3667-4245 http://www.pasta.or.jp/index.html	15-6 Nihonbashi Kabutocho Chuo-ku, Tokyo 103-0026

All Nippon Spice Assoc.	Tel: 81(0)3-3237-9360 Fax: 81(0)3-3237-9360 www.ansa-spice.com	Sankyo Main Bldg. #505 1-7-10 Iidabashi Chiyoda-ku, Tokyo 102-0072
Chocolate & Cocoa Assoc. of Japan	Tel: 81(0)3-5777-2035 Fax: 81(0)3-3432-8852 http://www.chocolate-cocoa.com/english/index.html (English)	JB Bldg. 6-9-5 Shimbashi Minato-ku, Tokyo 105-0004
Japan Baking Industry Assoc.	Tel: 81(0)3-3667-1976 Fax: 81(0)3-3667-2049	Seifun Kaikan 6F 15-6 Kabutocho Nihonbashi Chuoku, Tokyo 103-0026
Japan Bento Manufacturers Assoc.	Tel: 81(0)3-3356-1575 Fax: 81(0)3-3356-1817 http://www.bentou-shinkou.or.jp/index.html	2-8 Yotsuya Shinjuku-ku, Tokyo 160-0004
Japan Canners Assoc.	Tel: 81(0)3-5256-4801 Fax: 81(0)3-5256-4805 www.jca-can.or.jp	10-2, Kanda-Higashi Matsushita-cho, Chiyoda-ku, Tokyo 101-0042
Japan Dairy Industry Assoc.	Tel: 81(0)3-3261-9161 Fax: 81(0)3-3261-9175 http://www.nyukyou.jp/	Nyugyo Bldg. 1-14-19 Kudan Kita Chiyoda-ku, Tokyo 102-0073
Japan Dry Fruits Importers Assoc.	Tel: 81(0)3-3253-1231 Fax: 81(0)3-5256-1914	5-7 Akihabara Taitoku, Tokyo 110-0006
Japan Freeze Dry Food Industry Assoc.	Tel: 81(0)3-3432-4664 Fax: 81(0)3-3459-4654	c/o Nihon Shokuryo Shimbun 1-9-9 Yaesu, Chuo-ku, Tokyo 103-0028
Japan Frozen Foods Assoc.	Tel: 81(0)3-3541-3003 Fax: 81(0)3-3541-3012 www.reishokukyo.or.jp	3-17-9, Tsukiji Chuo-ku, Chuo-ku, Tokyo 103-0024
Japan Grain Importers Assoc.	Tel: 81(0)3-3431-3895 Fax: 81(0)3-3431-3882	2-39-8, Nishishinbashi Minato-ku, Tokyo 105-0003
Japan Ham & Sausage Processors Assoc.	Tel: 81(0)3-3444-1523 Fax: 81(0)3-3441-1933	5-6-1 Ebisu Shibuya-ku, Tokyo 150-0013
Japan Health Food and Nutrition Assoc.	Tel: 81(0)3-3268-3134 Fax: 81(0)3-3268-3136 http://www.jhnfa.org/	2-7-27 Ichigaya Sadoharacho Shinjuku-ku, Tokyo 162-0842
Japan Honey Assoc.	Tel: 81(0)3-3297-5645 Fax: 81(0)3-3297-5646 http://bee.lin.gr.jp/index.html	Bajichikusan Kaikan 2-6-16-Shinkawa, Chuo-ku Tokyo 104-0033
Japan Ice Cream Assoc.	Tel: 81(0)3-3264-3104 Fax: 81(0)3-3230-1354 www.icecream.or.jp	1-14-19 Kudan Kita Chiyoda-ku, Tokyo 102-0073
Japan Fish Traders Assoc.	Tel: 81(0)3-5280-2891 Fax: 81(0)3-5280-2892 www.jfta-or.jp	No.2 Muneyasu Bldg. 1-23 Kanda-Nishikicho, Chiyoda-ku, Tokyo 101-0054 *Need Password
Japan Meal Replacement Assoc.	Tel: 81(0)3-3263-0957 Fax: 81(0)3-3263-1325 http://www.nsouzai-kyoukai.or.jp/	Kojimachi Annex 6F 4-5-10 Kojimachi Chiyoda-ku, Tokyo 102-0083
Japan Meat Traders Assoc. (JMTA)	Tel: 81(0)3-3588-1665 Fax: 81(0)3-3588-0013 http://www.jm-ta.jp/	Daini Watanabe Bldg., 6F 1-7-3 Higashi Azabu Minato-ku, Tokyo 106-0044

Japan Nut Association	Tel: 81-(0)3-5649-8572 Fax: 81(0)3-6662-6528 http://www.jna-nut.com/	Kohinata Bldg., #203 2-18-10 Shinkawa Chuo-ku Tokyo 104-0033
Japan Peanuts Assoc.	Tel: 81(0)3-3584-7311 http://www.peanuts-jp.com/	1-9-13, Akasaka Minatoku, Tokyo 107-0052
Japan Poultry Assoc./Japan Egg Producers Assoc.	Tel: 81(0)3-3297-5515 Fax: 81(0)3-3297-5519 http://www.jpa.or.jp/index2.asp	Bajichikusan-kaikan 2-6-16 Shinkawa Chuo-ku, Tokyo 104-0033
Japan Processed Tomato Industry Assoc.	Tel: 81(0)3-3639-9666 Fax: 81(0)3-3639-9669 www.japan-tomato.or.jp	15-18 Nihonbashi Kodenma Chuo-ku, Tokyo 103-0001
Japan Snack Cereal Foods Assoc.	Tel: 81(0)3-3562-6090 Fax: 81(0)3-3561-6539 http://jasca.jp/	Hoei Bldg., 5F 2-11-11 Kyobashi Chuo-ku, Tokyo 104-0031
Japan Sauce Industry Assoc.	Tel: 81(0)3-3639-9667 Fax: 81(0)3-3639-9669 www.nippon-sauce.or.jp	15-18 Kodenmacho Nihonbashi Chuo-cho, Tokyo 103-0001
Japan Soba Noodle Assoc.	Tel: 81(0)3-3264-3801 Fax: 81(0)3-3264-3802 http://www.nihon-soba-kyoukai.or.jp/	2-4 Kanda Jinbocho Chiyoda-ku, Tokyo 101-0051
Japan Swine Assoc.	Tel: 81(0)3-3370-5473 Fax: 81(0)3-3370-7937 http://www.jppa.biz/	1-37-20, Yoyogi Shibuya-ku, Tokyo 151-0053

Table 9: Japanese Associations - Beverages

Organization Name	Telephone/Fax URL	Address
All Japan Coffee Assoc.	Tel: 81(0)3-5649-8377 Fax: 81(0)3-5649-8388 http://coffee.ajca.or.jp	6-2 Hakozakicho Nihonbashi Chuo-ku, Tokyo 103-0015
Brewers Association of Japan	Tel: 81(0)3-3561-8386 Fax: 81(0)3-3561-8380 http://www.brewers.or.jp/english/index.html (English)	Showa Bldg., 4F 2-8-18 Kyobashi Chuo-ku, Tokyo 104-0031
The Mineral Water Assoc. of Japan	Tel: 81(0)3-6225-2884 Fax: 81(0)3-6225-2885 www.minekyo.jp	CM Bldg., 3-3-3 Nihonbashi-Muro-machi, Chuo-ku, Toyo 103-0022
Japan Soft Drinks Assoc.	Tel: 81(0)3-3270-7300 Fax: 81(0)3-3270-7306 http://www.j-sda.or.jp/about-jsda/english.php (English)	3-3-3 Nihonbashi- Muromachi Chuo-ku, Tokyo 103-0022
Japan Spirits & Liquors Makers Assoc.	Tel: 81(0)3-6202-5728 Fax: 81(0)3-6202-5738 http://www.yoshu.or.jp/	2-12-7, Nihonbashi Chuo-ku, Tokyo 103-0025
Japan Wines & Spirits Importers Assoc.	Tel: 81(0)3-3503-6505 Fax: 81(0)3-3503-6504 http://www.youshu-yunyu.org/english/index.html (English)	Daiichi Tentoku Bldg. 1-13-5 Toranomon Minato-ku, Tokyo 105-0001
Japan Wineries Assoc.	Tel: 81(0)3-6202-5728 Fax: 81(0)3-6202-5738 http://www.winery.or.jp/	2-12-7 Nihonbashi Chuo-ku, Tokyo 103-0027

Table 10: Japanese Associations - Distribution

Organization Name	Telephone/Fax URL	Address
New Supermarket Assoc. of Japan (NSAJ)	Tel: 81(0)3-3255-4825 Fax: 81(0)3-3255-4826 www.super.or.jp	Sakurai Bldg., 4F Uchikanda 3-19-8 Chiyoda-ku, Tokyo, 101-0047
Japan Chain Stores Assoc.	Tel: 81(0)3-5251-4600 Fax: 81(0)3-5251-4601 www.jcsa.gr.jp	1-21-17 Toranomon Minato-ku, Tokyo 105-0001
Japan Department Stores Assoc.	Tel: 81(0)3-3272-1666 Fax: 81(0)3-3281-0381 www.depart.or.jp	Yanagiya Bldg., 2F 2-1-10 Nihonbashi Chuo-ku, Tokyo 103-0027
Japan Food Service Assoc. (JF)	Tel: 81(0)3-5403-1060 Fax: 81(0)3-5403-1070 www.jfnet.or.jp	Central Bldg., 9-10F 1-29-6 Hamamatsucho Minato-ku, Tokyo 105-0013
Japan Food Service Distribution Assoc.	Tel: 81(0)3-5296-7723 Fax: 81(0)3-3258-6367 www.gaishokukyo.or.jp	2-16-18 Uchikanda Chiyoda-ku, Tokyo 101-0047
Japan Franchise Assoc. (JFA)	Tel: 81(0)3-5777-8701 Fax: 81(0)3-5777-8711 http://jfa.jfa-fc.or.jp/	Daini Akiyama Bldg. 3-6-2 Toranomon Minato-ku, Tokyo 105-0001
Japan Hotel Assoc.	Tel: 81(0)3-3279-2706 Fax: 81(0)3-3274-5375 http://www.j-hotel.or.jp/english/ (English)	Shin Otemachi Bldg.. 2-2-1 Otemachi Chiyoda-ku, Tokyo 100-0004
Japan Medical Food Service Assoc.	Tel: 81(0)3-5298-4161 Fax: 81(0)3-5298-4162 www.j-mk.or.jp	Forte Kanda. 5F 1-6-17 Kajicho Chiyoda-ku, Tokyo 101-0044
Japan Processed Foods Wholesalers Assoc.	Tel: 81(0)3-3241-6568 Fax: 81(0)3-3241-1469 http://homepage3.nifty.com/nsk-nhk/	Edo Bldg., 4F 2-3-4 Honmachi, Nihonbashi Chuo-ku, Tokyo 103-0023
Japan Restaurant Assoc.	Tel: 81(0)3-5651-5601 Fax: 81(0)3-5651-5602 www.joy.ne.jp/restaurant	BM Kabuto Bldg. 11-7 Nihonbashi Kabuto-cho Chuo-ku, Tokyo 103-0026
Japan Retailers Assoc.	Tel: 81(0)3-3283-7920 Fax: 81(0)3-3215-7698 www.japan-retail.or.jp	3-2-2 Marunouchi Chiyoda-ku, Tokyo 100-0005
Japan Self-Service Assoc.	Tel: 81(0)3-3255-4825 Fax: 81(0)3255-4826 http://www.jssa.or.jp/	Sakurai Bldg., 4F 3-19-8, Uchikanda, Chiyoda-ku Tokyo, 101-0047

Reports and Further Information

The following homepages and reports can provide useful information to interested exporters.

- ***Agricultural Trade Office's homepages***

  http://www.usdajapan.org (English)

  http://us-ato.jp (English/Japanese)

- ***GAIN reports on the food sectors in Japan (Retail, HRI, Food Processing)***

  The above reports are annually updated. Please access http://gain.fas.usda.gov/Pages/Default.aspx, to obtain the latest reports.

- Retail report, select “Country: Japan,” and “Categories: Retail Foods”
- HRI report: select ”Country: Japan,” and “Categories: Food Service – Hotel Restaurant Institutional”
- Food Processing report: select “Country: Japan,” and “Categories: Food Processing Ingredients’

Or please access http://www.usdajapan.org/# and click the “Reports” menu button to get information and report.

- ***Food and Agricultural Import Regulations and Standards (FAIRS) Report***
  The FAIRS report is a comprehensive guide to Japan's food and beverage regulations, standards and requirements for importation. At the URL, http://gain.fas.usda.gov/Pages/Default.aspx, set your search to select “Country: Japan”, and “Categories: FAIRS Subject Report”.

  Or please access http://www.usdajapan.org/# and click the “Reports” menu button to get information and report.

- ***Japan External Trade Organization (JETRO) Reports***
  An Excellent source for links to other Japanese government websites, food sector reports and English translations of Japan’s documents. http://www.jetro.go.jp/
  Most relevant documents are at: http://www.jetro.go.jp/en/market/regulations/index.html

Appendix- Statistics

Table A. Key Trade & Demographic Information

Data is for 2013	
Agricultural Imports from all Countries ($Mil)/U.S. Market Share (%)[/1]	$57,780 / U.S. 23.78%
Consumer Food Imports from all Countries ($Mil)/U.S. Market Share (%)[/1]	$31,581 / U.S. 21.70%
Edible Fishery Imports from all Countries ($Mil)/U.S. Market Share (%)[/1]	$13,931 / U.S. 8.53%
Total Population (Millions)/Annual Growth Rate (%)[/2]	127.30 / -0.17%
Number of Major Metropolitan Areas[/3]	12
Per Capita Gross Domestic Product (U.S. Dollars)[/4]	$38,468
Unemployment Rate (%)[/5]	4.0%
Percent of Female Population Employed[/5]	48.9%
Exchange Rate (Japan Yen per US$)[/6]	103.10 (2013 yearend)

1. Import data: Global Trade Atlas
2. Total Population/Annual Growth Rate: Statistics Bureau, Ministry of Internal Affairs and Communication
3. Population by city: Ministry of Internal Affairs and Communication
4. Per capita GDP: international Monetary Fund (2013)
5. Unemployment Rate / Percent of Female Population Employed: Statistics Bureau, Ministry of Internal Affairs and Communication;
6. Exchange Rate: Japan custom

Table B. Consumer Food and Edible Fishery Product Imports

Japanese Imports (in Millions of Dollars)	Imports from the World 2011	Imports from the World 2012	Imports from the World 2013	Imports from the U.S. 2011	Imports from the U.S. 2012	Imports from the U.S. 2013	U.S. Market Share % 2011	U.S. Market Share % 2012	U.S. Market Share % 2013
CONSUMER-ORIENTED AGRICULTURAL TOTAL	32,868.77	34,082.63	31,581.27	6,834.47	7,231.25	6,854.05	20.79	21.22	21.70
Snack Foods (excl Nuts)	668.94	722.85	705.88	58.19	73.07	74.69	8.70	10.11	10.58
Breakfast Cereals & Pancake Mix	21.98	26.27	27.46	2.56	3.55	4.18	11.65	13.53	15.24
Red Meats, Fresh/Chilled/Frozen	8,533.67	8,567.30	7,469.79	3,018.78	3,145.68	2,915.10	35.37	36.72	39.03
Red Meats, Prepared/Preserved	3,176.57	3,484.55	3,283.25	444.32	459.78	495.27	13.99	13.19	15.08
Poultry Meat	1,716.04	1,255.26	1,201.61	121.97	70.01	51.97	7.11	5.58	4.32
Dairy Products	612.18	591.22	595.20	124.71	107.00	97.83	20.37	18.10	16.44
Eggs & Products	183.05	190.44	192.28	67.76	54.48	57.84	37.02	28.61	30.08
Fresh Fruit	2,186.15	2,277.33	1,998.27	487.95	528.99	437.44	22.32	23.23	21.89
Fresh Vegetables	972.84	1,112.07	978.92	149.89	159.78	147.36	15.41	14.37	15.05
Processed Fruit & Vegetables	4,589.83	4,936.87	4,693.87	825.50	913.36	836.08	17.99	18.50	17.81
Fruit & Vegetable Juices	882.29	938.42	879.51	140.39	153.49	156.36	15.91	16.36	17.78
Tree Nuts	422.08	496.33	539.82	247.44	304.28	361.29	58.62	61.31	66.93
Wine & Beer	1,412.34	1,651.03	1,652.90	93.14	111.30	122.10	6.59	6.74	7.39
Nursery Products & Cut Flowers	668.32	719.24	645.68	7.16	7.32	6.68	1.07	1.02	1.03
Pet Foods (Dog & Cat Food)	850.17	830.05	782.18	204.14	186.29	155.24	24.01	22.44	19.85
Other Consumer-Oriented Products	5,972.32	6,283.40	5,934.65	840.57	952.87	934.62	14.07	15.16	15.75
FISH & SEAFOOD PRODUCTS	16,411.49	16,394.46	13,931.98	1,408.25	1,516.39	1,188.47	8.58	9.25	8.53
AGRICULTURAL PRODUCT TOTAL	62,985.91	61,569.50	57,779.87	16,803.49	15,756.17	13,740.54	26.68	25.59	23.78
AGRICULTURAL, FISH & FORESTRY TOTAL	92,042.35	90,135.42	84,372.77	19,064.41	18,128.61	15,927.25	20.71	20.11	18.88

Source: Global Trade Atlas

Table C. Top 15 Suppliers of Consumer Foods and Edible Fishery Products

CONSUMER-ORIENTED AGRICULTURAL Japanese top 15 suppliers ($1,000)	2011	2012	2013
United States	**6,834,470**	**7,231,249**	**6,854,048**
China	5,460,496	5,929,795	5,446,248
Australia	2,972,718	2,826,842	2,516,972
Thailand	2,422,592	2,571,907	2,476,856
Brazil	1,851,426	1,450,749	1,368,887
France	1,255,883	1,369,687	1,303,906
New Zealand	1,330,809	1,378,884	1,246,197
Canada	1,443,724	1,460,048	1,087,697
Philippines	1,096,375	1,107,844	983,744
Korea South	1,021,759	1,072,491	893,685
Mexico	696,733	837,804	810,569
Italy	695,128	754,398	785,925
Denmark	1,027,505	939,061	766,339
Netherlands	500,116	489,199	526,686
Singapore	532,754	542,915	517,385
Others	3,726,288	4,119,760	3,996,120
World	**32,868,775**	**34,082,634**	**31,581,265**

Source: Global Trade Atlas

Fish & Seafood products Japanese top 15 suppliers ($1,000)	2011	2012	2013
China	2,910,202	2,898,517	2,465,579
Thailand	1,518,359	1,585,818	1,259,568
Russia	1,434,073	1,509,640	1,209,251
United States	**1,408,255**	**1,516,396**	**1,188,469**
Vietnam	869,264	914,693	912,280
Indonesia	868,704	914,347	848,657
Norway	900,757	918,326	789,967
Chile	1,534,310	948,186	786,431
Korea South	797,646	803,124	656,104
India	428,459	368,912	426,794
Taiwan	536,896	581,908	407,364
Canada	468,773	480,891	397,324
Australia	324,440	289,020	221,193
Philippines	198,797	240,358	209,933
Morocco	106,159	121,277	163,054
Others	2,106,395	2,303,043	1,990,012
World	**16,411,489**	**16,394,457**	**13,931,980**

Source: Global Trade Atlas