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Japan

Exporter Guide

2012 Update

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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 $821.31 billion. In 2011, the United States exported $14.86 billion worth of agricultural and fish products to Japan. Despite of years of stagnation in the economy, 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.

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

Note:

1. US$1=Y79.97, the average exchange rate of 2011, is used to convert the figures in yen to US dollars in this report unless otherwise mentioned.
2. 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 2011, the United States exported $14.86 billion worth of agricultural and fish products to Japan ($15.61 billion including forest products). The total food and drink market in Japan is huge, valued at around $821.31 billion, when the food retail sector and the food service sector are combined. If you have a quality product that meets the needs and wants 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, you can build an attractive market position in Japan.

1. Current Trends

Japan's food market for high-value foods and beverages continues to change dramatically, with the latest trends toward 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 making 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, due to the protracted sluggish economy in the country, the consumers, in general, demand good value in the products they purchase as well. Major supermarket chains are coping with this situation by introducing a wide variety of their own private 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 predicted 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. To put these opportunities in perspective, here is a list of the most important U.S. advantages and challenges:

Table 1. Advantages and Challenges

U.S. Advantages	U.S. Challenges
• Weak dollar • 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 • 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	• Increasing food safety concerns and demands for food production information among Japanese consumers • Long distance from Japan • Consumer antipathy toward biotech foods and additives • Japanese preoccupation with quality • Consumers' preference of domestically produced products • High cost of marketing in Japan • Complicated labeling laws • High duties on many products • Increasing competition with China and other food exporting countries • Exporters are often expected to commit to special contract requirements and long-term involvement

II. Exporter Business Tips

The following are suggestions on exporting food products to Japan.

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-cut, 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*). 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 prepared for misunderstandings; use tact and patience.
- 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); *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 need for value, not just quality.

3. Export Business Reminders

Below are some important reminders about exporting to Japan:

- Limit your number of trading partners, but try to avoid exclusive agreements with any 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 ingredient, 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 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.
- 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.
- 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/)
- Carefully check your food additive admissibility: (e.g., preservatives, stabilizers, flavor enhancers). For information on U.S. laboratories approved by the Japanese Government, visit the Ministry of Health, Labor and Welfare's website at http://www.mhlw.go.jp/topics/yunyu/5/dl/a3.pdf.
- Verify all relevant import requirements with your Japanese customers. They will normally have update 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). (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 inspectors. The points outlined below should aid in this process:

- Review the USDA's "Japan: Food and Agricultural Import Regulations and Standards (FAIRS) Country Report" to get a better understanding of these procedures (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".)
- 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 a 5% consumption tax to all imports.
- 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 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 other requirements in advance and obtain proper USDA inspections in the United States (www.aphis.usda.gov and www.fsis.usda.gov).
- Approval for biotech agricultural products and ingredients is regulated by the Japanese government. These products 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 materials, 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 $533.11 billion (42.63 trillion yen) in 2011, 1.6% 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 larger general merchandise stores (GMS), supermarkets (SM), and convenience stores (CVS). These three categories offer excellent opportunities to U.S. food exporters although there exists 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 (2011)	19.8%		4.5%	12.6%	63.1%	
Future growth	M	H to M	L to M	M	D	D

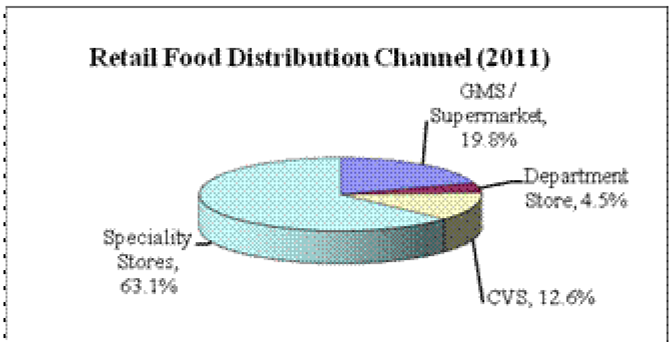
expectations*						
Receptivity to imports**	H to M	H to M	M	H to M	M	M
Suitable for:						
Established brands	H to M	H to M	H	M	M	M
High quality/high price	H to M	H to M	H	H to M	M	M
Good quality/low price	H	H	M	H	M	M
New products	H	H	H	H	M	M

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

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

Sources: METI Commercial Census (2011); ATO estimates on import growth and receptivity.

Chart 2. Retail Food Distribution Channels



Source: METI Commercial Census 2011

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 offering excellent opportunities to U.S. food exporters.

Supermarkets

Supermarkets (SM) stores are smaller in size than GMS's and are more specialized in food and household goods. On average, food items such as perishables, readymade-meals, bakery, and refrigerated foods 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 excellent opportunities to U.S. food exporters. These retailers carry imported products particularly as a mean to differentiate themselves from other competing stores in their region.

Department Stores

Department store sales have been declining in recent years due to the economic downturn as well as to increasing competition with GMS's and other retailers. Food sales made by department stores currently 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

Convenience stores (CVS) are becoming 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. They are well known for their high turnover and advanced inventory management.

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, however, offer limited market potential to exporters. They are served by secondary or tertiary wholesalers, which, in turn, are supplied by Japan's major wholesalers. This sector has been shrinking as the food market has become more competitive. Deregulation of liquor licensing, for example, led to the closure of many small family-owned liquor shops. 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 store chain operators, and various readymade foods sold at convenience and department stores. (There is thus some overlap with the channels outlined above.) Although the growth in the HMR sector is slowing down as well due to the current sluggish economy, the sector is expected to be 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.

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.
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 $288.20 billion (23.48 trillion yen) in sales in 2011, 1.7% down from the previous year. The sector has been stagnant for several years due to the economic downturn in the country. In particular, it was adversely affected as consumers refrained from dining out and traveling after the Great Earthquake in March 2011.

This sector can be divided into four major segments by business category: 1) restaurants; 2) hotels and other accommodation 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

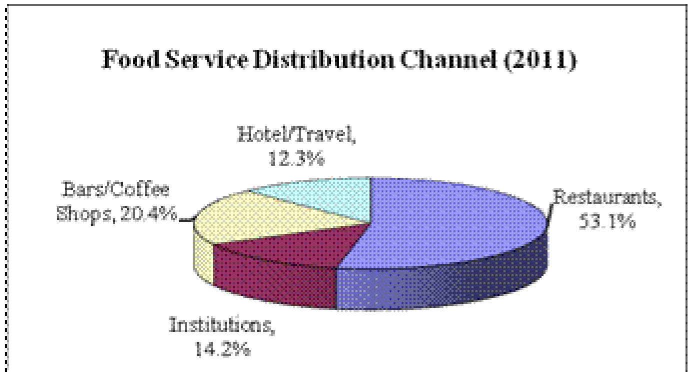
	Restaurants	**Hotels/ Travel related**	**Bars/ Coffee shops**	**Institutional**
Sales Share (2011)	53.1%	12.3%	20.4%	14.2%
Future growth expectations*	H to M	H	H to M	M
Receptivity to imports**	H	H	H to M	H
Especially suitable for:				
High quality/high price	H to M	H	M	L
Good quality/low price	H	H	H	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 3. 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$ 152.9 billion in sales in 2011, 2.1% down from the previous year. 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 with HMR.

Major "family restaurant" chains are becoming increasingly important for international suppliers. Because 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 Other Travel-Related Facilities

This segment suffered severely, 3.1% down from the previous year. As consumers refrained from traveling after the Great Earthquake in March, 2011, the vacancy rates of hotels softened. However, from the latter half of the year, the business prospects started improving.

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 20.4% of the total food service sales and are a major market for foreign beverages and snack foods. The sales from the segment showed 0.6% decrease in 2011, following 0.5% decrease in the previous year. Among this segment, coffee shops are down by 0.1%, while bars and beer hall were down by 0.9%. However, these establishments tend to be small and difficult to reach. The best way to reach these outlets is to work with the large food distributors.

Institutional Food Markets

The institutional market comprised of cafeterias at factories, offices, hospitals and schools, generated $40.9 billion in 2011, 0.1% down from the previous year, accounting for 14.2% of the total food service sales. The cafeteria operations of these institutions are typically served by contract caterers. Building relationships with caterers is, therefore, essential to crack this market. Both contract caterers and institutions with their own kitchens are typically serviced by large food service wholesalers. Because the most important criterion for these institutional suppliers is cost competitiveness, the sector offers huge market potential to U.S. exporters. 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.

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

Japan’s proportion of Internet users reached 78.0%, equivalent to that of the U.S. (79%) in 2009. With this 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 63.65 billion, 9.0% up from the previous year in FY2011 (April to March). The sales were doubled in a decade and e-commerce is the main growth engine in the industry. While online sales are often dominated by electronics and clothing, food, in particular organic food and natural food, is a large category within the area of e-commerce.

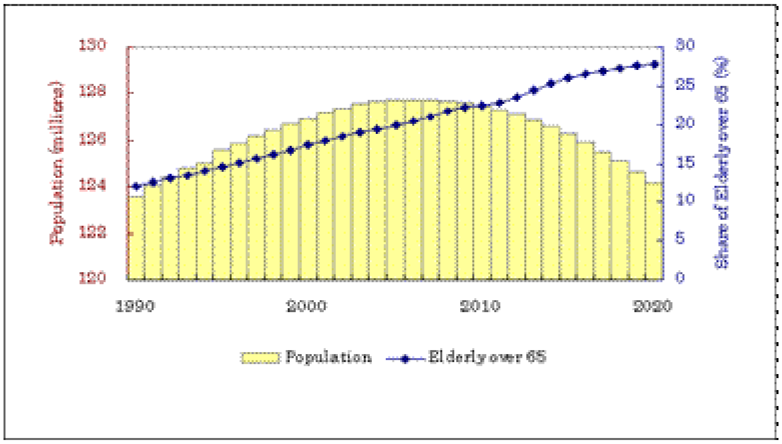
According to the Japanese Ministry of Internal Affairs and Communications, online sales are expected to continue to expand as customers cite that internet shopping has many advantages such as that it can be done 24/7, saves time with no transportation cost, makes comparing products and prices easy, and 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. It was not until the first half of 2005 that Japan experienced negative population growth, when the number of deaths outnumbered the number of births. According to Ministry of Health, Labor, and Welfare, 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 2011, Japan’s population was estimated at 127.80 million, 0.2% 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 a negative, the older population in Japan enjoys a high standard of living and is relatively wealthy. The aging of Japan will present opportunities for high value, high quality products.

Chart 4. 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 "best" import prospects. They have been selected based on a number of criteria—high volume, demonstrated growth, and U.S. competitiveness.

Table 5. Best Import Prospects

Product Category	HS Code	2011 Market Size	2011 World Imports	5 year Avg.* Annual Import Growth (2006-2011) (volume)	Import Tariff Rate	Key Constraints to Market Development	Market Attractiveness for U.S.A.
Fresh Fruit Sector: World Import Value (2011):$ 2,186 million							
Watermelon	080711	Volume: 309,200 MT	World volume: 3,055MT value: $3.7 million US volume: 1,839MT value: $2.0 million	Volume growth: World: 110.45% US:127.77%	6%	The Japanese watermelon market is heavily dominated by domestic products. U.S. watermelon is relatively new to the Japanese market, and consumers and trade are not aware of their attractive features.	The Japanese trade is increasingly aware of the features of U.S. watermelons, especially its high quality and taste. The ongoing growth in the packaged cut fruits market provides additional opportunities. Domestic

							production is declining.
Processed Fruits & Vegetables Sector: **World Import Value (2011):$ 4,589 million**							
Frozen Potatoes (Uncooked or cooked by steaming or boiling in water)	071010	N.A.	World volume: 40,576 MT value: $47.5million US volume: 29,682MT value: $34.1million	Volume growth World: 43.65% U.S.88.87%	8.5%	The key suppliers of frozen potato products (excluding Frozen French fries) are domestic processors. Consumers prefer domestic products.	Japanese consumers have become more cost-conscious, making U.S. products look more attractive. Japanese trade and food service industry have yet fully taken advantage of the variety and versatility of U.S. products. U.S. potatoes, including non-fried frozen potatoes, fit well into the healthier eating styles, a growing trend in Japan.
Peanuts (Ground Nuts), Prepared or Preserved, Nesoi, including Peanut Butter	200811	volume: 83,404 MT	World volume: 63,104MT value: $146 million US volume: 3,566MT value: $16.3million	Volume growth: World: minus 0.42% US:23.13%	10% - 23.8%	Production of peanuts continues to decline in Japan. Only a few prefectures produce peanuts. In fact, 75% of the total domestic supply comes from one single prefecture, Chiba. China has been the main exporter of peanuts to Japan, but the Japanese peanut	U.S. will need to meet Japanese MRL and aflatoxin regulations, develop the ability to accommodate Japanese specifications, and build strong and long term relationships with importers and processors. In the meantime, Japanese peanuts processors have started thinking of importing shelled peanuts or investing farmers and shellers in the U.S. in order to produce peanuts meeting Japanese demands.

						industry realizes that it needs other reliable suppliers to avoid shortages in the future. Lack of consumer awareness of the health benefits of peanuts.	
Peanuts **World Import Value (2011):$ 60 million**							
Peanuts-(Ground Nuts), Not Roasted or Otherwise Cooked, Whether or not Shelled or Broken	1202	volume: 51,210MT	World volume: 30,910MT value: $60.6million US volume 8,078MT value: $14.5million	Volume growth: World: minus 5.70 % US: 22.17 %	10% within quota 617 yen/kg – above quota Free for oil extraction.	The same as above. (HS2008.11) Japan maintains a quota system.10 % tariff applies to the quantity within the quota. Above the quota, 617 yen/kg applies.	The same as above (HS2008.11)
Prepared Red Meat Sector **World Import Value (2011):$ 3,176million**							
Sausage	1601	Total Supply volume: 391,912 MT	World volume: 45,702 MT value: $252 million US: volume: 9,231 MT value: $ 49.8 million	Volume growth: World : 2.35% US: 8.82%	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. Japanese sausage market appears to be a growing niche market for imported specialty sausages (finished products) cater well to needs of food service industry.
Fresh/Chilled/Frozen Red Meat Sector: World Import Value (2011):$ 8,534million							
Chilled/Frozen Beef Cut	0201, 0202	Total Supply volume: 1.24 million MT	World volume: 517,231 MT value: $ 2.65 billion US volume: 120,605 MT value: $687.5 million	Volume growth: World 2.35% US: 75.14%	38.5%	Overall growth for Japanese beef market has been constrained by various BSE restrictions imposed both on domestic and imports since 2001. Japan restricts imports of US beef allowing only beef cuts derived from animals aging 20 months or younger with strict import conditions specified under the Export Verification Program (EV).	Ongoing talks to relax Japan's import restrictions on U.S. beef, pending a successful conclusion, may likely result in increased imports of U.S. beef, especially filling the demand for medium grade grain fed cuts, by expanding its market share in Japan. This would help overall growth of Japanese beef market.
Beef Offal, Tongue and so on	0206.100206.210206.22 0206.29	Not available	Total Import volume: 44,192 MT value: $ 412	Volume growth: World: 8.43% US: 74.37 %	12.8%	The same with beef cuts as the EV program applied to high value offal item such as tongue.	The same as above.

			million US: volume: 17,186 MT value: $173 million				
Cheese Sector: **World Import Value (2011):$ 1,114million**							
Cheese	0406	Total Supply volume: 270,000 MT	Total Import volume: 215,262 MT value: $ 1,114 million US: volume: 21,424 MT value: $112.7 million	Volume growth: World: 0.74% US: 34.3 %	Natural Cheeses: 22.4% - 29.8% Processed Cheese: 40%	Japan still maintains a high tariff on imported process cheese (40%) to protect domestic dairy.	Over the past five years, the United States is an emerging supplier of natural cheeses to Japan (Top three after Australia and New Zealand). Food service industry is the major client of American natural cheeses, especially for shred purpose for pizzas and so on.
Wine & Beer Sector: **World Import Value (2011):$ 1,412 million**							
Craft Beer (statistics in the right columns are on general beer)	2203	General beer market: volume 5,813,000 KL (2010), including happoshu and other low-malt beers	Total import volume: 42,370 KL value: $68.2million US: volume: 1,982KL value: $3million	Volume growth: World: 2.36% US: 3.35%	free	- Low recognition on higher price than regular beer in the market - Bigger presence and more beer pubs relate to European craft beer are creating better image than U.S. craft beer, because most of specialty beer pubs are operated by major Japanese beer brewers which have tied-up with European craft beer brewers	- U.S. craft beer producers brew high quality products that can attract Japanese consumers who distinguish high-value products - Growth of number of high quality American restaurants in the market may provide opportunities to U.S. craft beer - Young Japanese consumers are receptive to new American life style if marketing efforts are concentrated in this target on a long-term basis

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

*Note: 5-year avr. annual growth is compound annual growth rate from 2006 to 2011.

V. Key Contacts

The following tables provide information on key contacts in Japan.

Table 6: U.S. Government

Organization Name	Telephone/Fax URL/E-mail	Address
Agricultural Trade Office 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 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

Table 7: U.S. State Government Offices in Japan

Organization Name	Telephone/Fax URL	Address
Alabama	Tel: 81(0)3-3655-3508 Fax: 81(0)3-5232-3508 www.ado.state.al.us	Minami Aoyama Bldg., 5F 1-10-2 Minami Aoyama Minato-ku, Tokyo 107-0062
Arkansas	Tel: 81(0)3-54474530-98157471 Fax: 81(0)3-54474530-98007472 http://www.arkansasedc-japan.comwww.arkansas-jp.org / http://arkansasedc.com	5-13-1, Toranomon, Minato-ku Tokyo, 105-0001Room 806, AIOS Hiroo Bldg. 1-11-2 Hiroo Shibuya-ku, Tokyo 150-0012
Colorado	Tel: 81(0)3-5272-1041 Fax: 81(0)3-3207-6685 http://coloradojapan.org	2-3-26 Nishiwaseda, Shinjuku-ku, Tokyo 169-0051
	Tel: 81(0)3-3539-1676 Fax: 81(0)3-3504-8233	Bureau Executive Tower Toranomon, 205

Georgia	www.global-georgia.org	2-7-16 Toranomon, Minato-ku, Tokyo 105-0001
Indiana	Tel: 81(0)523-253-55483234-3875 Fax: 81(0)352-2533234-55493886 www.indiana-japan.orghttp://www.indiana-japan.org	Ichinose Bldg., 5F 3-5-11, Koji-machi2-10-19, Sakae, Naka-kuChiyoda-ku, NagoyaTokyo 460-0008102-0083
Iowa	Tel: 81(0)3-3222-6901 Fax: 81(0)3-3222-6902 www.iowatokyo.com / www.iowa.gov	Room 903 Central Bldg 22-1 Ichibancho Chiyoda-ku, Tokyo 102-0082
Mississippi	Tel: 81(0)45-222-2047 Fax: 81(0)45-222-2048 www.mississippi.org	Yokohama World Porters 6F 2-2-1 Shinko, Naka-ku, Yokohama, Kanagawa, 231-0001
Missouri	Tel: 81(0)3-5724-3968 Fax: 81(0)3-5724-3967 www.missouridevelopment.orghttp://www.missouri-japan.org/office.html	2-3-3-202, Koyamadai, Shinagawa-ku, Tokyo, 142-0062
Montana	Tel: 81(0)96-385-0782 Fax: 81(0)96-381-3343 http://agr.mt.gov / www.bigskyjapannebraskacenterjapan.com.com	6-18-1, Suizenj Kumamoto 862-8570 6-18-1, Suizenj Kumamoto 862-8570
Nebraska	Tel: 81(0)3-5366-2444 Fax: 81(0)3-6804-9440 www.bigskyjapan.com	Shinten Bldg. 3F, 20-7 Samon-cho, Shinjuku-ku, Tokyo 160-0017
North Carolina	Tel: 81(0)3-3435-9301 Fax: 81(0)3-3435-93013 www.nccommerce.com / http://www.nctokyo.com/	Suzuki Bldg., 5F 3-20-4 Toranomon Minato-ku, Tokyo 105-0001
Oregon	Tel: 81(0)3-6430-0771 Fax: 81(0)3-6430-0775 http://oregon.gov / www.oregonjapan.org	2-16-1, Higashi-Shinbashi Minato-ku, TokTokyo 105-0021
Pennsylvania	Tel: 81(0)3-3505-5107 Fax: 81(0)3-5549-4127 www.pa-japan.org	KY Bldg., 7F 3-16-14, Roppongi, Minato-ku, Tokyo 106-0032
South Carolina	Tel: 81(0)3-5642-6317 Fax: 81(0)3-5642-6319 http://sccommerce.com/	1-2-2, Kayaba-cho, Nihonbashi, Chuo-ku, Tokyo 103-0025
Tennessee	Tel: 81(0)45-222-2042 Fax: 81(0)45-222-2043 www.state.tn.us / http://www.tennesseejapan.com/	Yokohama World Porters 6F 2-2-1 Shinko-cho, Naka-ku, Yokohama Kanagawa, 231-0001
Texas	Tel: 81(0)3-3400-1352 Fax: 81(0)3-3400-0570 www.statetexas.gov.tx.us	2-15-9 Hiroo Shibuya-ku, Tokyo 150-0012
Virginia	Tel: 81(0)3-5404-3424 Fax: 81(0)3-5404-3401 www.yesvirginia.org	Kamiyacho MT Bldg., 14F 4-3-20 Toranomon, Minato, Tokyo 105-0001
West Virginia	Tel: 81(0)52-953-9798 Fax: 81(0)52-953-9795 http://www.boc.state.wv.us/ http://www.westvirginia.or.jp/	Sakae Nippon Life Insurance Bldg., 7F, 3-24-17 Nishiki, Naka-ku, Nagoya 460-0003

Table 8: U.S. Trade Associations and Cooperator Groups in Japan

Organization Name	*Telephone/Fax URL*	*Address*
Alaska Seafood Marketing Institute	Tel: 81(0)3-3225-00008 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 530-00047
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)3-5301-2131 Fax: 81(0)3-5301-2138	Aios Toramp,pm 9F 1-6-12 Nishishimbashi, Minato-ku, Tokyo 107-0003
American Soybean Association	Tel: 81(0)3-5563-1414 Fax: 81(0)3-5563-1415 www.soygrowers.com	KY Tameike Bldg., 4F 1-6-19 Akasaka Minato-ku, Tokyo 107-0052
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 Strawberry Commission	Tel: 81(0)3-4578-9389 Fax: 81(0)50-3488-4172 www.calstrawberry.com	9F UCF Win Aoyama Bldg. 2-2-15 Minami AoyamaMinato-ku, Tokyo 107-0062
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 Tomato Farmers	Tel: 81(0)3-3505-6204 Fax: 81(0)3-3505-6353 http://californiatomatofarmers.com/	Pacific Bldg..3F 1-5-3 Higashiazabu Minato-ku, Tokyo 106-0044
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
Cherry Marketing Institute	Tel: 81(0)3-4578-9389 Fax: 81(0)50-3488-4172 http://www.choosecherries.com/	9F UCF Win Aoyama Bldg. 2-2-15 Minami AoyamaMinato-ku, Tokyo 107-0062
Cotton Promotion Institute, Japan	Tokyo/ Tel: 81(0)90-3945-0360 Osaka/ Tel: 81(0)6-6231-2665 Fax: 81(0)6-6231-4661 http://www.cotton.or.jp/	Hirakawacho Mori Tower 1704 2-16-2 Hirakawacho Chiyoda-ku, Tokyo 102-0093 5-8 Bingomachi 2-chome Chup-ku, Osaka 541-0051
Dairy Export Council, U.S.	Tel: 81(0)3-3221-6410	Seibunkan Bldg., 5F

	Fax: 81(0)3-3221-5960 www.usdec.org	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
Grains Council, U.S.	Tel: 81(0)3-3505-0601 Fax: 81(0)3-3505-0670 www.grains.org / http://grainsjp.org/	KY Tameike Bldg.., 4F 1-6-19 Akasaka Minato-ku, Tokyo 107-0052
Hawaii Papaya Industry Association	Tel: 81(0)6-4560-6031 Fax: 81(0)6-4560-6039 http://www.hawaiipapaya.com/	Yodoyabashi Mitsui Bldg. 4-1-1 Imabashi Chuo-ku, Osaka 541-0042
Meat Export Federation, U.S.	Tel: 81(0)3-3584-3911 Fax: 81(0)3-3587-0078 www.americanmeat.jp	KY Tameike Bldg.., 5F 1-6-19 Akasaka Minato-ku, Tokyo 107-0052
Napa Valley Vintners Japan Office	Tel: 81(0)80-5051-1151 Fax: N.A.	3-28-10 Sakura, Setagaya-ku, Tokyo, 156-0053
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 AoyamaMinato-ku, Tokyo 107-0062
Oregon Wine Board	Tel: 81(0)3-3266-9978 Fax: 81(0)3-3266-9299 http://oregonwine.org/	291-1-502 Yamabuki-cho Shinjuku-ku, Tokyo 162-0801
Pet Food Institute	Tel: 81(0)3-5530-8441 Fax: 81(0)3-5530-8442 www.petfoodinstitute.org	Ariake Frontier Building Tower B, 9F. 3-7-26 Ariake, Kotoku, Tokyo 135-0063
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
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 State Fruit Commission	Tel: 81(0)3-4578-9389 Fax: 81(0)50-3488-4172 http://www.nwcherries.com/index.html	9F UCF Win Aoyama Bldg. 2-2-15 Minami AoyamaMinato-ku, Tokyo 107-0062
Washington Wine Commission	Tel: 81(0)78-854-7270 Fax: 81(0)78- 854-7271 http://www.washingtonwine.org/	2-2-5-602 Mikage Higashinada-ku, Kobe 658-0056
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
	Tel: 81(0)3-5614-0798	Seifun Kaikan 9F

Wheat Associates, U.S.	Fax: 81(0)3-5614-0799 www.uswheat.org	15-6Nihonbashi 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 9: 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 www.zennoh.or.jp	1-8-3 Otemachi Chiyoda-ku, Tokyo 100-0004
JETRO Atlanta	Tel: 404-681-0600 Fax:404-681-0713 www.jetro.org /	245 Peachtree Center Avenue NE, Marquis One Tower Suite 2208, Atlanta, GA30303
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	201 Third Street, Suite 1010 San Francisco CA 94103

Table 10: Japanese Associations - Food

Organization Name	Telephone/Fax URL	Address
	Tel: 81(0)3-3432-3871	

All Japan Confectionery Assoc.	Fax: 81(0)3-3432-4081 http://www.pcg.or.jp/english/index.html	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 www.chocolate-cocoa.com	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 www.bentou-shinkou.or.jp	Shinichi Bldg., 10F 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	10-6 Nihonbashi-Kobunacho 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	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 www.souzai.or.jp	Kojimachi Annex 6F 4-5-10 Kojimachi Chiyoda-ku, Tokyo 102-0083
Japan Meat Traders Assoc.	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/	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 Association	Tel: 81(0)3-3370-5473 Fax: 81(0)3-3370-7937	1-37-20, Yoyogi Shibuya-ku, Tokyo 151-0053

Table 11: 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 www.brewers.or.jp	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	Shinjuku Murata Bldg., 4F 1-28-4, Shinjuku Shinjuku-ku, Tokyo 160-0022
Japan Soft Drinks Assoc.	Tel: 81(0)3-3270-7300 Fax: 81(0)3-3270-7306 www.j-sda.or.jp	3-3-3 Nihonbashi- Muromachi Chuo-ku, Tokyo 103-0022
Japan Spirits & Liquors	Tel: 81(0)3-6202-5728	2-12-7, Nihonbashi

Makers Assoc.	Fax: 81(0)3-6202-5738 http://www.yoshu.or.jp/	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/	Bldg. 5 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 12: Japanese Associations - Distribution

Organization Name	Telephone/Fax URL	Address
National Assoc. of Supermarkets	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 Store 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 Store 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.	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 Wholesalers 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.	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 www.j-hotel.or.jp	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 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'

- ***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".

- ***Japan Food Trends***

At the URL, http://gain.fas.usda.gov/Pages/Default.aspx, set your search to select "Country: Japan", and "Categories: All Categories".

- ***Japan External Trade Organization (JETRO) Reports***

  Excellent source for links to other government websites, food sector reports and English translations for the Government 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 2011	
Agricultural Imports from all Countries ($Mil)/U.S. Market Share (%)	$62,986 / U.S. 26.68%
Consumer Food Imports from all Countries ($Mil)/U.S. Market Share (%)	$32,869 / U.S. 20.79%
Edible Fishery Imports from all Countries ($Mil)/U.S. Market Share (%)	$16,411 / U.S. 8.58%
Total Population (Millions)/Annual Growth Rate (%)[/1]	127.80 / -0.20%
Number of Major Metropolitan Areas[/2]	12
Per Capita Gross Domestic Product (U.S. Dollars) [/3]	$35,200 est.
Unemployment Rate (%)[/4]	4.5%
Percent of Female Population Employed[/5]	42.21%
Exchange Rate (Japan Yen per US$)[/6]	79.97 (Ann. Avg. in 2011)

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: CIA World Fact book
5. Unemployment Rate: Statistics Bureau, Ministry of Internal Affairs and Communication; U.S. Bureau of Labor Statistics
5. 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 2009	2010	2011	Imports from the U.S. 2009	2010	2011	U.S. Market Share % 2009	2010	2011
CONSUMER-ORIENTED AGRICULTURAL TOTAL	24,453.96	27,653.56	32,868.77	5,059.71	5,819.83	6,834.47	20.69	21.05	20.79
Snack Foods (excl Nuts)	533.36	589.95	668.94	41.06	53.86	58.19	7.70	9.13	8.7
Breakfast Cereals & Pancake Mix	16.68	17.04	21.98	3.78	3.05	2.56	22.68	17.90	11.65
Red Meats, Fresh/Chilled/Frozen	6,414.47	7,337.45	8,533.67	2,101.82	2,422.60	3,018.78	32.77	33.02	35.37
Red Meats, Prepared/Preserved	2,270.14	2,560.37	3,176.57	335.70	375.45	444.32	14.79	14.66	13.99
Poultry Meat	881.26	1,149.93	1,716.04	34.16	69.71	121.97	3.88	6.06	7.11
Dairy Products	426.19	467.95	612.18	67.22	89.50	124.71	15.77	19.13	20.37
Eggs & Products	141.92	147.15	183.05	39.59	46.12	67.76	27.89	31.35	37.02
Fresh Fruit	2,014.19	2,028.59	2,186.15	386.57	476.14	487.95	19.19	23.47	22.32
Fresh Vegetables	623.37	875.91	972.84	87.12	136.99	149.89	13.98	15.64	15.41
Processed Fruit & Vegetables	3,360.86	3,848.81	4,589.83	689.91	759.16	825.50	20.53	19.72	17.99
Fruit & Vegetable Juices	610.21	612.04	882.29	106.29	113.00	140.39	17.42	18.46	15.91
Tree Nuts	298.43	374.65	422.08	164.82	223.13	247.44	55.23	59.56	58.62
Wine & Beer	1,142.50	1,238.20	1,412.34	72.00	83.42	93.14	6.30	6.74	6.59
Nursery Products & Cut Flowers	542.13	633.18	668.32	7.68	7.34	7.16	1.42	1.16	1.07
Pet Foods (Dog & Cat Food)	777.18	812.02	850.17	205.09	209.40	204.14	26.39	25.79	24.01
Other Consumer-Oriented Products	4,401.08	4,960.32	5,972.32	716.90	750.95	840.57	16.29	15.14	14.07
FISH & SEAFOOD PRODUCTS	12,592.59	13,854.07	16,411.49	1,209.70	1,244.99	1,408.25	9.61	8.99	8.58
AGRICULTURAL PRODUCT TOTAL	44,353.08	50,651.64	62,985.91	12,973.73	13,861.95	16,803.49	29.25	27.37	26.68
AGRICULTURAL, FISH & FORESTRY TOTAL	65,799.84	75,054.16	92,042.35	14,808.54	15,871.98	19,064.41	22.51	21.15	20.71

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)

	2009	2010	2011
United States	5,059,707	5,819,828	6,834,470
China	3,643,551	4,442,864	5,460,496
Australia	2,460,966	2,666,038	2,972,718
Thailand	1,864,927	2,049,545	2,422,592
Brazil	1,035,552	1,285,225	1,851,426
Canada	1,205,195	1,348,554	1,443,724
New Zealand	1,034,969	1,150,658	1,330,809
France	1,020,651	1,092,178	1,255,883
Philippines	1,121,237	987,059	1,096,375
Denmark	837,030	947,024	1,027,505
Korea South	615,916	755,666	1,021,759
Mexico	532,095	601,593	696,733
Italy	607,672	581,515	695,128
Singapore	384,772	453,284	532,754
Netherlands	437,891	488,587	500,116
Others	2,591,827	2,983,944	3,726,288
World	24,453,959	27,653,564	32,868,775

Source: Global Trade Atlas

Fish & Seafood products
Japanese top 15 suppliers
($1,000)

	2009	2010	2011
China	2,104,989	2,441,766	2,910,202
Chile	1,056,392	1,110,773	1,534,310
Thailand	1,098,890	1,271,186	1,518,359
Russia	1,026,806	1,175,754	1,434,073
United States	1,209,699	1,244,989	1,408,255
Norway	627,953	767,106	900,757
Vietnam	702,295	789,530	869,264
Indonesia	731,684	773,719	868,704
Korea South	614,568	707,640	797,646
Taiwan	395,482	529,909	536,896
other	3,023,828	3,041,701	3,633,023
World	12,592,585	13,854,072	16,411,489

Source: Global Trade Atlas