

Required Report: Required - Public Distribution

Date: May 10, 2024

Report Number: JA2024-0021

Report Name: Exporter Guide Annual

Country: Japan

Post: Osaka ATO

Report Category: Exporter Guide

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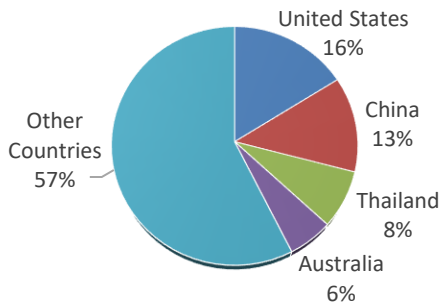
Report Highlights:

The Japanese food market was valued at \$564 billion in 2022 with retail sales accounting for \$327 billion (58 percent) and foodservice sales accounting for \$237 billion (42 percent). Japan relies on imports from other countries for the bulk of its food supply. The United States was the leading supplier of consumer-oriented agricultural products with a 17 percent market share. The Japanese market is highly competitive with consumers seeking quality, value, and convenience. This report serves as an all-in-one resource for U.S. exporters to Japan with information on the food and beverage market, business culture, consumer preferences, import regulations, trends, and the U.S.-Japan Trade Agreement. Links are provided to additional resources with further details on each of these topics.

Executive Summary:

The United States is the largest foreign supplier of food and agricultural products to Japan. Meanwhile, Japan was the fourth largest market for U.S. agricultural products in 2023 (\$13 billion). On January 1, 2020, the U.S.-Japan Trade Agreement (USJTA) entered into force, providing preferential tariff access for many U.S. agricultural products. Japan’s food industries are well-developed and innovative in all sectors, including, retail, food service, food processing, and distribution.

Consumer-Oriented Agricultural Imports (2023)



Food Retail Industry: In 2022, the total value of all retail food and beverage (F&B) sales in Japan totaled \$327 billion. Supermarkets continue to represent the bulk of sales in the retail food market, accounting for 35 percent, with convenience stores, drugstores and internet sales of food and beverages accounting for the rest of the market.

Food Processing Industry: In 2022, the total sales from the Japan food service industry increased 14.2 percent, totaling nearly \$237 billion, representing consecutive year double digit growth. Recovery in the sector was attributed to the strong rebound in tourism, with visitors to Japan exceeding 10 million.

Food Service Industry: The \$182 billion food processing industry produces a wide variety of foods: traditional Japanese, Western, and health-oriented foods for infants and the elderly. Food processors focus on maintaining market share among traditional product lines while developing creative and innovative food products to attract consumers.

Quick Facts CY 2023

Imports of Consumer-Oriented Products
39 billion USD

List of Top 10 Growth Products in Japan

- 1) Confectionary Products
- 2) Dairy Products (Cheeses)
- 3) Whey & Whey Protein Products
- 4) Processed Vegetables
- 5) Mixed Vegetables
- 6) Meat Products
- 7) Egg & Egg Related Products
- 8) Condiments and Sauces
- 9) Rye Whiskey & Bourbon
- 10) Other Consumer Oriented Products

Food Industry by Channels (U.S. billion)

Retail Food Industry	\$327
Food Service-HRI	\$237
Food Processing	\$182
Food and Agriculture Exports	\$9

Top 10 Host Country Retailers

AEON	Life Co
Seven & I Holdings	H2O Retailing
Yamazaki Baking	Valor Holdings
Pan Pacific Intl Holdings	USM Holdings
Isetan Mitsukoshi	Izumi

GDP/Population

Population (millions): 124.2 (Feb. 2024 est.)
GDP (billions USD): 4,232 (2022)
GDP per capita (USD): 33,816

Sources: Trade Data Monitor, Japan Ministry of Finance, Japan Ministry of Economy, Trade and Industry, Japan Food Service Association, The World Factbook, The World Bank

Strengths/Weaknesses/Opportunities/Threats

Strengths	Weaknesses
- U.S. products are in demand and remain trendy.	- The negotiating and decision-making process can take time.
Opportunities	Threats
- With USJTA, nearly 90 percent of U.S. products are duty free or receive preferential tariff access.	- For products in USJTA, many other suppliers enjoy tariff concessions through other FTAs.

Section I: Market Overview

In 2023, Japan’s gross domestic product (GDP) totaled \$4.2 trillion, making it the world’s fourth largest economy. Due to declining birth rates, the Japanese population (estimated at 124 million as of January 2024) is shrinking and steadily aging. 29 percent of the population is currently over the age of 65 and this number is expected to rise to 35 percent by 2040. Japan has among the world’s highest average life expectancies at 87 years for women and 81 years for men in 2022. (Sources: The World Factbook, United Nations, Statistics Bureau, Ministry of Internal Affairs and Communications, Ministry of Agriculture, Forestry and Fisheries and Ministry of Economy, Trade and Industry)

The Japanese food market was valued at \$564 billion in 2022 with retail sales accounting for \$327 billion (58 percent) and foodservice sales accounting for \$237 billion (42 percent). Japan relies on imports from other countries for the bulk of its food supply. On a caloric basis, Japan’s food self-sufficiency rate was 38 percent in 2022 with the remaining 62 percent derived from imported products. However, on a value basis Japan’s food self-sufficiency rate is 58 percent due to comparatively high domestic food prices. The United States is the leading agricultural product supplier with 16 percent import market share in 2023. The aging of Japan’s population has focused attention on healthy and functional foods, especially those with a high protein content. Lower birth rates have led to smaller family units, increasing demand for high-quality and high-value products in smaller packages.

Advantages and Challenges

ADVANTAGES	CHALLENGES
Reduced duties under the U.S.-Japan Trade Agreement	Some U.S. products face higher tariffs than competitor suppliers due to trade agreements such as CPTPP and the Japan-EU EPA
U.S. products have a good quality reputation	Japanese consumers generally prefer domestic products over imports and are willing to pay a premium for “made in Japan”
Perception of the United States as a reliable supplier with large production capacity	Desire for Japanese importers to diversify risk by sourcing from multiple countries
High standards for food safety and animal/plant health	Strict regulatory standards for imports that sometimes exceed U.S. domestic regulations
Diverse range of product availability from bulk to intermediate to consumer-oriented	High costs for marketing in Japan and the need to adjust retail packaging for domestic market
Increasing westernization of consumer food preferences	Deliberate pace of business decision-making and the expectation of long-term involvement and commitment by foreign suppliers
Variety of product availability with flavors and different functions	Price inflation and the strengthening of the U.S. dollar vis-à-vis the Japanese yen have made U.S. products less competitive

Section II: Exporter Business Tips

Market Research

U.S. exporters to Japan are encouraged to review USDA Japan reporting on commodities and sectors of interest. In addition to this report, USDA Japan annually publishes reports analyzing the retail, foodservice, and processing sectors. There are also ad hoc reports on home meal replacements, health foods, organic products, and other products. All these reports and more are available at www.usdajapan.org/market-research and <https://gain.fas.usda.gov>.

Trade Shows in Japan

Japanese buyers often prefer to find new food and beverage products at large trade shows or specially-targeted trade showcases instead of “cold calls” or requests for introductory meetings with individual companies. Many trade shows in Japan are well-suited for U.S. food and beverage companies. These include FOODEX Japan, Supermarket Trade Show, FABEX Kansai, and Food Style Kyushu. The ATOs in Tokyo and Osaka often organize USA pavilions at these shows. More information on Japan trade shows is available at www.usdajapan.org/find-a-partner/trade-shows.

Business Culture in Japan

Japanese businesspeople tend to prefer a formal approach to doing business. U.S. exporters are advised to make appointments as far in advance as possible, using e-mail rather than telephone and fax. It is important to carry business cards (*meishi*) to every engagement and present them formally with two hands. Decision making takes time in Japan so prepare for negotiations which may require several meetings to reach an agreement. Japanese buyers will likely request very detailed information on ingredients, production processes, and quality controls.

Consumer Preferences

There is a wide variety of consumer preferences in Japan. In general, Japanese consumers place high importance on food safety and quality. Many domestic producers emphasize traceability and farm-to-fork by placing photos of farmers on products packages. Perhaps the most notable difference between U.S. and Japanese consumer preferences relates to product packaging. Most Japanese homes are much smaller in size than U.S. homes and have limited storage space. As a result, Japanese food packages are small and easily storable. Large, bulk packaging is impractical which is one of the reasons why Japanese consumers spend a higher proportion of their income on food than most other developed nations.

U.S. Agricultural Trade Organizations (Cooperators)

Approximately 40 U.S. agricultural trade organizations (cooperators) have representatives in Japan who promote U.S. products and help member companies enter Japanese market. The full list of cooperators is available at www.usdajapan.org/find-a-partner/in-japan.

Section III: Import Food Standards, Regulations and Procedures

Food and Agricultural Import Regulations and Standards (FAIRS) Reports

Each year, USDA Japan publishes Food and Agricultural Imports Regulations and Standards (FAIRS) reports which describe Japan’s requirements for imported food and beverage products. The FAIRS Country Report provides information on general food laws and regulations for food additives, pesticides, packaging and containers, labeling, and other specific standards. The Japan FAIRS Export Certificate

Report provides information on the required certificates for export to Japan. Additional export guidance is available at www.usdajapan.org/export-guidance.

- [Japan FAIRS Country Report](#)
- [Japan FAIRS Export Certificate Report](#)

Shipping Samples

It is possible for U.S. exporters to send sample products to Japan for buyer consideration. Interested U.S. exporters are advised to review the following two reports which provide guidance for shipping small-sized individual samples and outline eligibility requirements for duty free shipments and import notification exemptions:

- [Guidance on Shipping Individual Small-Sized Samples to Japanese Buyers](#)
- [General Instructions for Shipping Product Samples to Japan](#)

U.S.-Japan Trade Agreement

The U.S.-Japan Trade Agreement (USJTA) entered into force on January 1, 2020. Following implementation of USJTA, nearly 90 percent of U.S. food and agricultural products imported into Japan are duty free or receive preferential tariff access. USDA Japan has developed a series of product briefs which provide concise overviews of how USJTA affects certain product groups. The full list of product briefs as well as other information on USJTA is available at www.usdajapan.org/usjta. Tariff treatment for agricultural products is searchable on the [USDA Agricultural Tariff Tracker](#) and may also be found in Japan's [Customs Tariff Schedule](#).

Section IV: Market Sector Structure and Trends

Market Sectors

Retail

In 2022, the total value of all retail food and beverage (F&B) sales in Japan totaled \$327 billion. As the market continues to transition to a post-COVID-19 environment, retailers and food and beverage manufacturers have implemented broad price increases on most food and beverage products, due to high inflation. Supermarkets continue to represent the bulk of sales in the retail food market, accounting for 35 percent, with convenience stores, drugstores and internet sales accounting for the rest. For details, see the USDA Japan [Retail Foods Report](#).

HRI Food Service

In 2022, the total sales from the Japan food service industry increased 14.2 percent, totaling nearly \$237 billion, representing consecutive year double digit growth. The recovery in the sector is largely attributed to the strong rebound in tourism, with visitors to Japan exceeding 10 million, boosting the recovery in restaurant sales in all categories. Japan's food service industry will continue to depend on imported foods, and the United States is well positioned to continue supplying this segment. For details, see the USDA Japan [Food Service HRI Report](#).

Food Processing

The industry experienced a 4.1 percent decline in the value of food produced in 2023 compared to 2022, totaling \$182 billion compared to \$190 billion in 2022. Production increases were seen in wheat flour, dairy, processed meats, and sugar categories. The \$182 billion food processing industry produces a wide variety of foods: traditional Japanese, Western, and health-oriented foods for infants and the elderly. Food processors focus on maintaining market share among traditional product lines while developing creative and innovative food products to attract consumers. For details, see the USDA Japan [Food Processing Ingredients Report](#).

Market Trends

Inflation

Following more than two decades of flat or declining prices, the Japanese economy has experienced sustained price rises over the two years due to global geopolitical factors as well as a significant weakening of the Japanese yen against the U.S. dollar. Food prices have risen with certain products rising at double-digit levels. This has helped break the deflationary mindset of consumers. In the past it was very difficult, if not impossible, for Japanese businesses to raise prices due to potential consumer backlash. This is no longer the case and consumers have come to expect it. For more details, see [Food Inflation Presents Challenges and Opportunities](#).

Product Trends

Non-Alcoholic Beers and Low Alcohol Beverages

The non-alcoholic beer market was estimated at 40.1 million cases (337 million liters) in 2021, a record high. The proportion of people who have consumed non-alcoholic beers at home has been steadily increasing each year, reaching 77.6 percent in 2022, also an all-time high. The pandemic certainly played a role as consumers drank more at home and selected healthier options. For more details, see the USDA Japan [Non-Alcohol Beverage Market Update 2023](#)

Seafood

Japan is one of the world's leading consumers of seafood. In 2023, it imported \$13.5 billion of seafood products, making it the world's fourth largest importer. Half of Japan's seafood demand is met by imports. The United States is the third largest seafood supplier to Japan, specializing in salmon, cod, pollock, herring, crab, and lobster. Despite seafood consumption declining in recent years, the Japanese market presents opportunities for unique products such as seafood meal kits, cubed seafood, and sauced seafood. For details, see the USDA Japan [Seafood Market Update](#).

Fresh Fruit

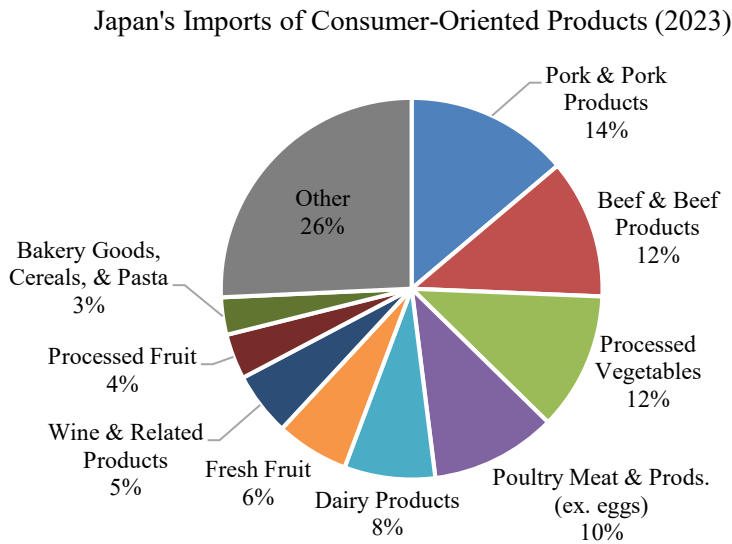
In 2022 Japan was the world's sixth largest importer of fresh fruit - relying on imports for around one-third of total domestic supply. The United States was the fifth largest supplier of fresh fruits to Japan with a 5 percent share of the market. The United States was the leading supplier of lemons and cherries and the second largest supplier of oranges, grapefruit, and kiwi fruit. Japan was the fourth largest export destination for U.S. fresh fruit. Declining domestic production has led Japan to become increasingly dependent on imported fruit and this trend is expected to continue. For details, see the USDA Japan [Fresh Fruit Market Update 2023](#).

Fresh Vegetables

Japan's fresh vegetable market is estimated at approximately 14 million metric tons of which around 5 percent comes from imports. The fresh vegetable market in Japan is highly competitive due to shrinking population and falling per capita vegetable consumption. As the Japanese market is mostly self-sufficient for fresh vegetables, Japan's reliance on imports increases mostly on spot basis coming from temporary domestic supply shortages. In 2023, the United States was the fourth largest supplier of fresh vegetables to Japan at \$52 million and the second largest by volume at 46,309 metric tons. The United States is the leading supplier of chipping potatoes, chicory, and celery. For details, see the [USDA Japan Fresh Vegetable Market Update 2024](#).

Section V: Agricultural and Food Imports

Agricultural and Food Import Statistics



Source: Japan Customs

Note: Categories defined using BICO-6, excluding manufactured tobacco

Best High-Value, Consumer-Oriented Product Prospects

Beef and Beef Products

In 2023, the United States exported \$1.8 billion of beef products to Japan, making Japan the second largest overseas market for U.S. beef after South Korea. 2023 imports were down from all major trading partners. In the United States, drought shrunk the herd size, which lowered beef production and raised prices. Purchasing with a depreciated yen made beef imports too expensive for many Japanese importers. Although imports were down dramatically, domestic demand for beef was weak, allowing importers to meet demand by drawing down perennially high inventories. For more on the Japanese beef market, see the USDA Japan [Livestock and Products Annual Report](#).

Pork and Processed Pork Products

In 2023, the United States exported \$1.4 billion of pork products to Japan, making Japan the second largest overseas market for U.S. pork after Mexico. Despite inflation's dampening effect on consumers,

FAS/Tokyo projects Japan's pork consumption in 2024 will hold steady from 2023 driven by strong demand in the retail as well as the food service sector, which continues to benefit from the post-COVID spike in tourism. Pork has become a staple animal protein for the Japanese diet, especially for home cooking. It is relatively price inelastic so less affected by inflation, but increasingly consumers favor the lower-priced cuts of pork. For more on the Japanese pork market, see the USDA Japan [Livestock and Products Annual Report](#).

Processed Vegetables

In 2023, the United States exported \$605 million of processed vegetable products to Japan, making Japan the second largest overseas market after Canada. Imports increased in 2023 due to the limited production of domestic vegetables as a result of the unfavorable weather conditions in the summer and fall 2023. For details, see [Record Heat Stifles Japanese Vegetable Production](#). Demand for frozen food, including frozen vegetables, in food service and retail is rising. The Japan Meteorological Agency projects that summer 2024 may also be unusually hot, potentially leading to another shortfall in domestic production.

Dairy Products

In 2023, the United States exported \$389 million of dairy products to Japan, making it the fourth largest export market. The United States remains as the second largest exporter of dairy products to Japan, after New Zealand and is the third largest country exporter of cheese after New Zealand and Australia. Cheese sales slumped in 2022 and 2023 due to rising prices. Domestic prices remain high due to rising input costs for dairy farmers while imports have slowed due to the weak yen. However, FAS projects that a rise in demand from the food service sector will help drive a recovery in demand in 2024. For more on the Japanese dairy market, see the USDA Japan [Dairy Products Annual Report](#).

Tree Nuts

In 2023, the United States exported \$328 million of tree nut products to Japan, making Japan the tenth largest overseas market for tree nuts. United States remain as the top source of tree nuts to Japan with 46 percent share by value. Import volume of tree nuts have dropped in 2023 due to rising prices, but the demand in the market as healthy snack is expected to continue. For more on the Japanese tree nuts market, see the USDA Japan [Tree Nuts Market in Japan Report](#).

Section VI: Key Contacts and Further Information

More information, including contact information for all four USDA offices in Japan, is available on www.usdajapan.org. For a list of relevant Japanese government agencies, please see the [Japan FAIRS Country Report](#)

U.S. Embassy Office of Agricultural Affairs
Physical Address: 1-10-5 Akasaka, Minato
City, Tokyo 107-8420, Japan
<http://www.fas.usda.gov>

Phone: +81 3 3224 5102
Email: agtokyo@usda.gov

Appendix I



U.S. Exports of Agricultural & Related Products to *Japan* CY 2017 - 2023 (in millions of dollars+)



Export Market: *Japan*

Product	Calendar Years (Jan-Dec)							% Change
	2017	2018	2019	2020	2021	2022	2023	
Bulk Total	4,234.0	4,904.3	4,048.8	3,983.7	5,642.7	6,190.1	4,654.2	-24.8
Wheat.....	714.0	717.0	609.2	634.6	702.2	915.9	692.0	-24.4
Corn.....	2,163.0	2,813.0	2,011.2	1,855.5	3,188.9	2,994.9	2,082.0	-30.5
Coarse Grains (excl. corn).....	55.0	83.2	63.1	58.2	7.3	13.4	12.4	-7.0
Rice.....	190.0	232.1	275.3	280.7	289.1	293.2	413.9	41.2
Soybeans.....	974.0	927.3	970.7	1,069.5	1,353.4	1,825.4*	1,359.0	-25.6
Oilseeds (excl. soybean).....	21.0	21.7	16.1	18.6	13.3	15.3	13.6	-11.5
Cotton.....	54.0	48.2	45.0	38.5	39.7	76.4	33.4	-56.3
Pulses.....	9.0	8.7	8.7	6.7	4.3	6.7	4.0	-40.8
Tobacco.....	1.0	1.0	0.2	0.4	3.2	0.0	0.1	691.4
Other Bulk Commodities.....	53.0	52.2	49.4	41.0	41.1	48.9	43.9	-10.1
Intermediate Total	1,316.0	1,438.4	1,515.4	1,377.1	1,526.2	1,647.9	1,352.2	-17.9
Milled Grains & Products.....	15.0	16.5	14.9	19.5	22.3	23.7	19.9	-16.0
Soybean Meal.....	107.0	147.1	139.1	96.4	133.1	170.4	122.3	-28.2
Soybean Oil.....	7.0	5.8	5.5	3.0	1.9	1.9	0.2	-87.3
Vegetable Oils (excl. soybean).....	23.0	23.4	22.3	19.4	16.9	21.2	15.8	-25.2
Animal Fats.....	1.0	3.2	1.8	3.2	1.0	1.3	2.1	54.2
Live Animals.....	55.0	59.3	73.6	59.3	93.5	64.2	45.8	-28.7
Hides & Skins.....	18.0	16.1	13.1	3.6	10.0	10.6	7.4	-30.7
Hay.....	414.0	425.6	490.5	484.8	511.7	498.4	388.7	-26.0
Distillers Grains.....	79.0	99.0	108.1	94.4	113.8	162.6*	126.3	-22.3
Other Feeds, Meals & Fodders.....	235.0	222.4	209.2	196.8	199.5	216.9	255.9	18.0
Ethanol (non-bev.).....	1.0	13.4	10.1	8.4	0.9	3.7	0.4	-87.9
Planting Seeds.....	71.0	65.3	71.7	58.9	62.6	75.5	55.7	-26.1
Sugar, Sweeteners, Bev. Bases..	37.0	52.3	53.8	44.9	51.1	58.3	50.7	-13.0
Dextrins, Peptones, & Proteins.....	89.0	84.0	76.9	81.9	102.6	100.4	63.3	-36.9
Essential Oils.....	98.0	118.7	112.5	92.3	84.7	92.4	99.3	7.4
Other Intermediate Products.....	67.0	86.4	112.2	110.3	120.6	146.4*	118.2	-19.3
Consumer Oriented Total	6,577.0	6,797.4	6,436.3	6,367.9	7,016.7	6,843.3	5,903.9	-13.7
Beef & Beef Products.....	1,889.0	2,102.2	1,950.3	1,940.6	2,355.3*	2,335.4	1,809.3	-22.5
Pork & Pork Products.....	1,626.0	1,630.5	1,523.4	1,622.9	1,691.6	1,477.9	1,397.0	-5.5
Poultry Meat & Prods. (excl. eggs)	85.0	68.5	52.5	27.0	35.3	28.5	33.0	15.5
Meat Products NESOL.....	82.0	92.4	96.2	82.3	93.2	89.2	89.7	0.6
Eggs & Products.....	58.0	48.3	38.2	39.6	49.1	46.7	54.8	17.3
Dairy Products.....	291.0	269.4	282.0	322.4	373.0	520.5*	389.4	-25.2
Fresh Fruit.....	316.0	318.6	323.2	314.4	299.5	228.4	216.1	-5.4
Processed Fruit.....	159.0	178.9*	144.7	145.1	158.3	162.4	115.4	-28.9
Fresh Vegetables.....	97.0	108.5	77.7	57.0	72.0	44.1	44.6	1.2
Processed Vegetables.....	521.0	508.6	506.7	475.2	477.4	529.7	605.2*	14.2
Fruit & Vegetable Juices.....	124.0	115.8	106.1	85.7	85.0	84.8	69.4	-18.1
Tree Nuts.....	398.0	434.4	416.0	386.0	437.2	401.4	328.3	-18.2
Confectionery.....	7.0	6.8	4.9	4.3	5.9	10.1	10.8	6.9
Chocolate & Cocoa Products.....	55.0	43.0	42.0	34.8	35.5	33.9	27.3	-19.3
Bakery Goods, Cereals, & Pasta...	91.0	91.4	84.4	85.7	86.5	90.9	76.3	-16.0
Food Preparations.....	216.0	207.1	173.8	175.5	189.0	155.4	89.0	-42.7
Condiments & Sauces.....	50.0	53.1	58.1	55.0	65.7	67.0*	58.1	-13.3
Non-Alcoholic Bev. (excl. juice)....	132.0	132.4	125.6	123.5	123.8	119.1	103.9	-12.7
Beer.....	6.0	9.5	15.8	18.1	13.1	9.6	5.7	-40.7
Wine & Related Products.....	94.0	92.9	92.4	79.6	84.8	109.3	89.6	-18.1
Distilled Spirits.....	112.0	118.0	138.6*	125.6	118.5	112.9	122.5	8.5
Nursery Products & Cut Flowers..	4.0	3.5	3.5	2.7	3.2	3.3	3.1	-4.9
Dog & Cat Food.....	96.0	119.9	130.4	118.7	118.7	135.2	122.3	-9.5
Other Consumer Oriented.....	71.0	45.8	49.7	46.3	45.2	47.6	42.9	-9.8
Agricultural Related Products	1,567.0	1,653.9	1,351.1	1,171.7	1,353.3	1,628.3	1,473.6	-9.5
Biodiesel & Blends > B30.....	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-
Forest Products.....	705.0	793.8	661.2	593.4	670.8	919.9	816.0	-11.3
Seafood Products.....	862.0	860.1	689.9	578.3	682.5	708.5	657.6	-7.2
Agricultural Products	12,127.0	13,140.1	12,000.5	11,728.7	14,185.5	14,681.3*	11,910.3	-18.9
Agricultural & Related Products	13,694.0	14,794.0	13,351.6	12,900.4	15,538.8	16,309.6	13,383.9	-17.9

Prepared By: Trade & Economic Analysis Division/GMA/FAS/USDA
Source: U.S. Census Bureau Trade Data

* Denote Highest Export Levels Since at Least CY 1970 www.fas.usda.gov/GATS
GATSHelp@fas.usda.gov

Biodiesel aggregate includes only higher-level and pure biodiesel HTS chapter 38 codes; biodiesel blends below 30% by volume (aka. petroleum oils containing biodiesel) found in chapter 27 are excluded.

Attachments:

No Attachments