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Japan

Exporter Guide

2010 Update

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Report Highlights:

Even with the current economic downturn, 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 \$700 billion. In 2009, the United States exported \$11.8 billion worth of agricultural and fish products to Japan (\$12.3 billion including forestry products). New trends are developing such as Japanese consumers are becoming more health conscious. Organic, naturally prepared, and functional foods are growing in popularity. 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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I. Market Overview

Japan continues to be one of the best opportunities in the world for U.S. exporters of food products. In 2009, the United States exported \$11.8 billion worth of agricultural and fish products to Japan (\$12.3 billion including forestry products). The total food and drink market in Japan is huge, valued at around \$700 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.

Current Trends

Japan's food market for high-value foods and beverages continues to change dramatically, with the latest trend being a major thrust 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 pay higher prices for quality and convenience. However, at the same time, due to the sluggish economy in Japan, the food industry has recognized that consumers in general demand reasonable prices in addition to quality. Consequently, the industry is responding with 100-yen (about \$1.10) produce stores and other types of discount food outlets. Some major retail chains are vying for differentiation by introducing their own private branded products with a lower price than nationally branded products and safety assurance by making their meat and produce products traceable back to growers and producers.

As the Japanese population is predicted to decline due to a low birth rate, the Japanese food market is expected to diminish 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.

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
<ul style="list-style-type: none"> • Strong yen versus weak dollar • U.S. food cost/quality competitiveness • Wide variety of U.S. products - including fresh, ingredients, and processed foods • 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. • High dependence on foreign food supply • Higher farming costs in Japan 	<ul style="list-style-type: none"> • Increasing food safety concerns and demands for food production information among Japanese consumers • Declining price competitiveness • Distance from Japan • Consumer antipathy toward biotech foods and additives • Japanese preoccupation with quality • Consumers' preference of domestically produced products (image problem with imported food in general) • 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.

Tips to Start Up

Before You Start:

1. Before considering export, please consider the following factors:

- If your company has the production capacity to commit to the export market.
- If your company has the financial and non-financial (staff, time, etc.) resources to actively support your exported product(s).
- If your company has the ability to tailor your product's packaging and ingredients to meet foreign import regulations, food safety standards, and cultural preferences.
- If your company has the necessary knowledge to ship overseas such as being able to identify and select international freight forwarders, temperature management, and other factors.
- If your company has the ability to navigate export payment mechanisms, such as developing and negotiating letters of credit.

Product and Market:

2. Determine whether import of your product is allowed by Japanese food regulation. Because of strict Japanese regulations, there are many agricultural products that are prohibited for import from the U.S. to Japan.

- Contact an ATO Japan office for a list of prohibited items.
- For plant or animal health information, contact your local APHIS office at:
http://www.aphis.usda.gov/animal_health/area_offices/.
- If the product contains meat or meat products, please refer to the Food Safety Inspection Service Export Library: http://www.fsis.usda.gov/regulations/Japan_Requirements/index.asp.

http://www.fsis.usda.gov/regulations/Export_Checklist/index.asp.

3. Perform Some Basic Market Research:

- The Market Assessment Checklist is an effective tool to organize and evaluate your market and product:

http://www.fas.usda.gov/agx/market_research/Market_Assessment_Checklist.pdf

- Determine whether there is demand for your product and what your target market will be.
- Determine whether your product is price competitive against Japanese and other producers, keeping in mind transportation costs as well as modification costs.
- Determine the comparative advantage of your products. Potential customers need to be convinced of the merit of using your products. Some examples are price savings, higher quality, higher value-added, or more convenient packaging.
 - ATO Japan offers a series of services to assist you. You should also contact your regional trade group:
 - Midwest: <http://www.foodexport.org/>
 - West: <http://www.wusata.org/>
 - Northeast: <http://www.foodexportusa.org/>
 - South: <http://www.susta.org/>
 - Review Japanese food regulations to determine if your product(s) comply with or need to be altered to fit local laws regarding additives, residue levels, and processing procedures. Also understand regulations in terms of weight, size, and labeling. JETRO's *Handbook for Agricultural and Fishery Products Import Regulations* is a helpful tool:
http://www.jetro.go.jp/en/reports/regulations/pdf/agri2009e_1007.pdf.

Develop an Export Action Plan:

4. Once you have collected the general market, products, and regulatory information, begin the process of creating an export action plan. This plan will be instrumental in helping distributors and buyers see your vision. Keep in mind that many portions of this plan will change after personal interaction with the market or as more information

is gathered.

This action plan should include:

- Objective
- Goals and benchmarks, short-term and long-term
- Product
- Market
- Product packaging and handling
- Product modifications, if applicable
- Financial resources to be committed
- Non-financial resources to be committed
- Additional financing
- Potential importers and buyers
- Schedule
- Marketing plan
- Evaluation

Get to Know the Market Personally:

5.Once you have determined that exportation is feasible and you have developed a basic strategy, either visit Japan to explore opportunities firsthand or find a representative to do so. When appointing agents, be sure your partner has a good reputation and track record in the market place. This face-to-face interaction is very important in business because Japan is unique in the respect that personal relationships are very important. Additionally, keep in mind that it takes time to form these relationships.

6.Understand how the Japanese distribution system works and begin the process of figuring out where you are to enter.

Finding a Buyer:

7.Begin looking for potential buyers and distributors. To find trade leads, participate in trade shows, use the trade leads service, and contact the ATO Japan.

- Trade shows: There are a variety of trade shows, large and small, which act as great tools for market research as well as for finding potential distributors. A list of USDA endorsed trade shows can be found at: http://www.fas.usda.gov/agx/trade_events/2010_2011TSCalendar.pdf.
- Trade Lead System: This trade leads service is a way in which U.S. suppliers of food and agricultural products can receive targeted trade leads from foreign buyers seeking to import their products. In order to take advantage of these timely leads, a U.S. company must be registered on the U.S. Suppliers List (USL) database. The USL is managed through a cooperative agreement between the United States Department of Agriculture (USDA) Foreign Agricultural Service (FAS) and the National Association of State Departments of Agriculture (NASDA). Register at: http://www.fas.usda.gov/agx/partners_trade_leads/us_suppliers_list.asp.

8.Meet with Japanese importers who distribute the types of agricultural products that you wish to export to learn more about the competitive environment.

9.Visit potential customers to determine if there is interest in your product and to determine how they normally source products.

- This is a good way to discover how products are normally reformulated and how packaging is

tailored to the marketplace. Most packaging or labeling will have to be changed for the Japanese market, as American packaging is normally too large.

Marketing:

10. When ready to market your product, use the ATO offices as resources for information on promotion and marketing.

Tips to Deal with the Japanese

Japanese business people, no matter how Western they may appear, do not always approach business relations in the same way as Americans or Europeans do. 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 about one week in mid-August during which many companies close and business people take vacations.

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, where appropriate, 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.

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 lists, the production process and quality assurance. Ensure that all the information is correct.
- Respond to such requests 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.

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.
(<http://gain.fas.usda.gov/Pages/Default.aspx>)
- 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/pdf/food-e.pdf>
- 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 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 the most 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) before exporting it to Japan. (<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.

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.
- Know 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

The exporter's single most important strategic decision—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.

Retail Sector

Japan's food retail market generated about \$442.9 billion in 2009. 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 in spite of severe competition from 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

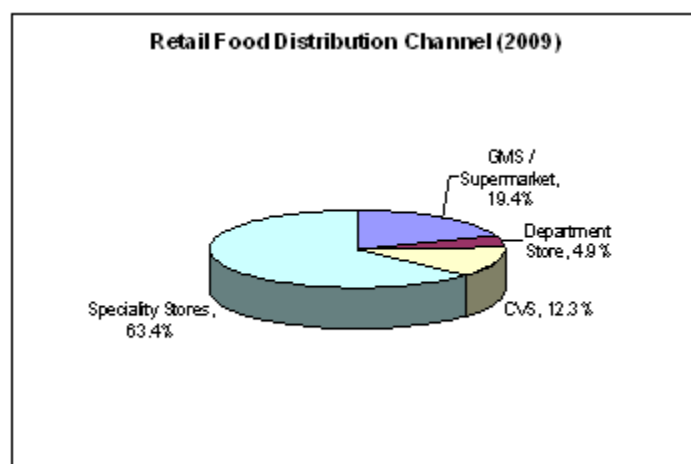
	GMS General Merchandise stores	SM Supermarkets	Department Stores	CVS Convenience stores	Specialty Stores	Semi Specialty Stores
Share (2009)	19.4%		4.9%	12.3%	63.4%	
Future growth expectations*	M	H to M	L to M	H to M	D	D
Receptivity to imports**	H to M	H to M	M	H to M	M	M
Suitable for:						
Established 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 (2009); ATO estimates on import growth and receptivity.

Chart 1. Retail Food Distribution Channels



Source: METI Commercial Census 2009

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, GMS's are open to new products and offer 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. Convenience stores have small floor space, about 100 m² 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 but other metropolitan areas may be able to offer opportunities to U.S. exporters.

Home Meal Replacement / HMR

As in North America and the EU, 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 willing to meet stringent cost, quality, and size specifications.

HRI Food Service Sector

The food service sector generated \$255.7 billion in sales in 2009, a 2.3% decrease from the previous year following a 0.5% decline. The continued decline is due mainly to reductions in corporate spending on entertainment under the severe economic situation in Japan.

The sector is comprised of the four major segments: 1) restaurants; 2) hotels and other accommodation facilities; 3) bars and coffee shops; and 4) institutional food service companies serving schools, hospitals, and corporate facilities. The characteristics of the four segments are summarized in the tables and charts below.

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

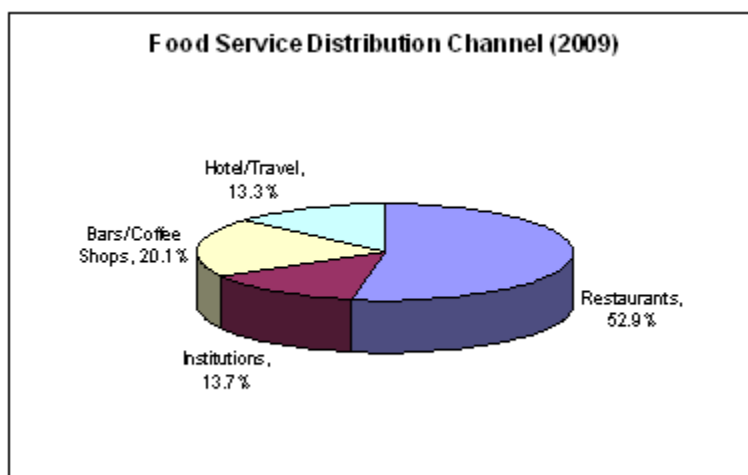
	Restaurants	Hotels/ Travel related	Bars/ Coffee shops	Institutional
Share (2009)	52.9%	13.3%	20.1%	13.7%
Future growth expectations*	H to M	H	H to M	M
Receptivity to imports**	H	H	H to M	H
Especially suitable for:				
High quality/high price	H to M	H	M	L
Good quality/low price	H	H	H	H
New products	H	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 2. Food Service Distribution Channel



Source: Food Service Industry Research Center

Table 4. Share of Restaurant Sales by Type of Outlet (2009)	
General restaurants	70.3%
Noodle shops	8.4%
Sushi shops	10.7%
Others	10.6%
	100.0%

Source: Food Service Industry Research Center

Restaurants

The restaurant segment generated approximately US\$ 135.3 billion in sales in 2009 and offers the best export prospects to the United States among the four food service segments. Restaurants generate more than a half of the current food service sales and comprise four main types of outlets as shown in the Table 4. When looking into the figure in detail, “general restaurants,” “noodle shops” and “sushi shops” all had declined in 2009 by 2.1%, 0.3% and 1.0% respectively, while “others”, which includes fast food shops, showed an increase of 1.5%. Due to the current slumping economy in Japan, fast food shops, which offer low-priced menu, showed growth.

As with the retail sector, the HRI sector is quite fragmented and most restaurant businesses are small. However, small family-owned restaurants have been disappearing due to increased competition with HMR, food retailers and restaurant chain operators.

Several 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

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 emphasize Japanese cuisine and thus are less receptive to imported Western products.

Theme parks are also an important part of the sector. Restaurants and snack outlets at both Tokyo Disneyland and Universal Studio 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 20.1% of the total food service sales. The sales from the segment showed 3.7% decrease in 2009 following 1.9% decrease in the previous year. While foreign chains such as Starbucks have made significant inroads in Japan over the last few years, coffee shops in general were hit by a major blow showing a decrease of 3.0% due to the bad economy in Japan. Still the segment is a major market for foreign beverages and snack foods.

Institutional Food Markets

The institutional market, comprised of cafeterias at factories, offices, hospitals and schools, generated \$35.1 billion in 2009, accounting for 13.7% of the total food service sales. The cafeteria operations of the 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 institutional suppliers is cost competitiveness, the sector offers huge market potential to U.S. exporters.

The institutional catering market shrank in 2009 mainly due to the sluggish economy, characterized by corporate

layoffs, consolidation of offices and factories, and cutbacks in corporate fringe benefits. However, long-term prospects are brighter as higher demand from contract caterers serving the hospital and social welfare segments is expected. This growth will be driven by an increasing aging population.

Food Processing Sector

Appendix C lists important food manufacturers in several food sectors. These food processors 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 recent food scandals in Japan and 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.

Online Sales in Japan

In 2009, the total number of Internet subscribers in Japan reached 99 million, more than doubled what it was in 2000 when the number of users recorded was 48 million. Nowadays, online shopping is becoming more and more popular among the Japanese and e-commerce is gaining popularity as well.

The Japanese Ministry of Economy, Trade and Industry stated that the market size for e-commerce was approximately \$55 billion in terms of annual sales in 2009. Japan's largest online mall, Rakuten, experienced a 19.4% increase in net sales from FY2008-2009. It appears that other online-based retailers are also experiencing continuous growth in Japan. While online sales are often dominated by electronics and clothing, food is a growing sector within the area of e-commerce.

According to a survey conducted by Yano Research Institute in 2009, the food sales of GMS, supermarket, and CVS through the Internet was also increasing, totaling \$248 million in CY2008, with its sales expected to grow 26% to reach \$312 million in CY2009. 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. Currently, it appears that growth of food sales on the

net is mainly organic food and natural food. The following table shows some of the Japanese websites selling food products.

Table 5. Japan Websites Selling Food Products	
Company Name	Site Address
Rakuten	http://www.rakuten.co.jp/
e-Yukiseikatsu	http://www.eu-ki.com/
Oisix Co., Ltd.	http://www.oisix.com/
Pal System Consumers Cooperative Union	http://www.pal.or.jp/group/
Radish Boya	http://www.radishbo-ya.co.jp/
Polan Organic Farming Association (POFA)	http://www.pofa.jp/
Alishan: Tengu Natural Foods	http://www.alishan-organics.com/index.html
Marukai E-store	http://www.marukaistore.com

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. As of October 2009, Japan's population was estimated at 127.51 million. 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 enjoy a high standard of living and are relatively wealthy compared to younger generations. The aging of Japan will present opportunities for high value, high quality products.

(For more detail, visit: <http://www.stat.go.jp/english/data/jinsui/2009np/index.htm#15k21-a>).

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 6. Best Import Prospects

Product Category	HS Code	2009 Market Size (1,000 MT)	2009 World Imports (1000 MT)	5-Yr Avg. Annual Import Growth	Import Tariff Rate	Key Constraints to Market Development	Market Attractiveness for U.S.A.
Cheese	0406	270	230	-3%	20-30% for natural cheese and 40% for processed cheese	The Japanese cheese market experienced steady growth up to 2007 and then experienced a major slump and drop in	The market has started picking up again from late 2009. Lower market prices, coupled with a favorable JP Yen exchange rate against

						consumption in 2008 due to soaring international prices. European exporters have established a strong brand image of supplying high-quality cheese to the market. Domestic natural cheese production has recently been expanding, supported by subsidies.	other major currencies, have created fairly positive market conditions. Specific to American cheese, a major breakthrough is expected in 2010 with Japan's imports likely to exceed the 10,000 MT level for the first time. Japanese importers expect favorable conditions for future U.S. exports and are eager to explore business opportunities.
Sausage	1601	330	294	5%	10%	The supply of sausage in Japan has historically been dominated by domestically manufactured products. Imported products from China are relatively low priced, and have a competitive edge that has been welcomed, especially by the value segment in Japan.	Market conditions started to change following a series of food safety related scandals/incidents involving Chinese foods a couple of years ago. Japanese traders began to look for other supply sources such as the United States and Thailand. Specific to American sausage, Japan's imports have grown by double digits over the past three years. The Japanese trade is increasingly aware of American sausage. A favorable exchange rate has added to the competitiveness of American products. Demand for certain products uniquely suited for use in American style foods including hot dogs and pizza toppings continues to grow.
Frozen Vegetables	0710 2004	871	721	-2%	6%~23.8%	Recent pesticide contamination in Chinese food products may deter consumers from purchasing frozen food products.	Imports of Chinese frozen vegetables have declined due to the pesticide contamination in Chinese frozen foods. Although the US imports share of frozen vegetables (HS code 0710) is only 14%, imports from the U.S. have increased 6% in the last 5 years. The U.S. is the largest supplier of frozen potato products, with 70% share of the total imports. Frozen potato imports from the U.S. have increased 15% in the last 5 years. Also, Japanese frozen food companies are becoming more active in pursuing overseas products.
Berries	0810.20	6.2	3.5	-21%	6%~9.6%	Although blueberries	HS code 0810.20

	0810.40 0811.20					are the main item among berry imports, the total imports of blueberries have been declining. As a result, Japanese imports of berries declined 21% in the last 5 years with the U.S. market share of imports maintained at the level of 37 – 38% during the same period. Promotional effort is needed.	(raspberries and blackberries) is still minor item, but its import volume has increased 10% in the last 5 years. Increasing competition from Mexico is still minor.
Tree Nuts	0802	---	52	-19%	Free~12%	U.S. has over 99% of the market share of HS 0802. U.S. producers should keep safety issues a top priority to maintain their current strong position.	Growing consumer awareness of the health benefits of nuts has increased consumption. Producers should continue promotion in the baking and confectionery sectors, as well as exploring new sectors.
Wine	2204	2,576 (1,000 hectoliters)	1,807 (1,000 hectoliters)	3.4%	15% or JPY125 per liter, whichever is the less, subject to a minimum customs duty of JPY67 per liter.	The Japanese wine market is very competitive, with France and Italy as the leading exporters to the market. In 2009, the U.S. sat at the fourth seat in terms of value with a 6.8% share of the \$783 million imported bottled wine market. While the U.S. has excelled in the lower end of the market, the development of mid-range products will be a challenge.	Total imports in volume increased 7.6% in 2009, confirming the continuous recovery of the Japanese market. Yet the overall value of wine imports decreased in 2009 as a result of increases in bulk wine shipments that were then bottled in Japan. This fairly new practice has large potential, as lower cost wines are still popular with the current economic climate. While California wine has been enjoying growing popularity for its wide range of varieties, Northwest wine is also growing in popularity as a high-quality wine.
Pet Food	2309.10	705 (JFY2008)	339	-6.43%	Free~PY59.5 per kg, plus JPY6 for every 1% exceeding 10% by weight of lactose contained.	Due to the occurrence of BSE cases in the U.S., beef-based pet food products from the U.S. are prohibited in Japan. New regulations on pet food went into force in 2009. Producers, importers, and distributors should make sure that their products comply with the regulations.	While the number of pets in Japan is increasing, the size of pets is decreasing, resulting in less consumption of pet food in volume. U.S. producers should concentrate on high-end product for smaller animals.
Salmon	0302.12 0303.11 0303.19 0303.22 0303.21	450	200	-17%	3.5%	Farm raised frozen salmon from Chile continues to dominate the market with its market share hovering around 60%. The U.S. is in	There is an increase in the demand for U.S. “natural” and “wild” salmon as opposed to the farm raised salmon. Seasonal promotion remains a plus.

						the 4 th position, following Chile, Norway, and Russia. Norway is a major supplier of fresh salmon to Japan. Fish prices have been increasing as fish consumption in the world has been rising due to heightened health consciousness.	
Functional Foods	--	---	--	--	See specific product category	Japan has strict food standard requirements that must be met. For the Japanese to recognize any new beneficial aspects of food, scientific evidence, education and promotion is necessary. The primary method to gain access as a health product is to get FOSHU (Foods for Specified Health Use) certification.	According to the Japan Health Food and Nutrition Food Association's survey of over 182 companies in August 2009, there are 833 FOSHU products with an estimated market size of US\$5.84 billion, a 20% reduction from 2007. The main reason for this reduction appears to be the weak economy. While the reduction is substantial, the functional foods market is still a segment of interest for domestic and international firms.
Beer	2203	6,111,000 KL (2008) (including happoshu and other low-malt beers)	30,729 KL	-0.8%	Free	Japanese government imposes higher tax on beer compared with other liquors. Five major domestic brewers control 98.4% of the beer market	Urban redevelopment projects have created new pubs and restaurants and increased opportunities especially for craft beer. Holidays and special occasions are suited for promotion of high quality products.
Whiskey	220830	76,067 KL (2008)	15,926 KL	-0.42%	Free	Creating brand recognition is often difficult without partnerships with leading Japanese liquor manufacturers who have close ties with distributors. Whiskey has generally been considered liquor consumed by men over 50 years old.	Since 2008, whiskey is making a comeback in the Japanese alcoholic beverage market. Japanese manufacturers' promotions have boosted demand for whiskey including imports notably among the young generation, who hardly consumed whiskey before. Highball, a drink made with whiskey, soda and ice, helped whiskey's popularity rise in the 80's. The highball has done it again. U.S. brands are price-competitive thanks to the strong yen. U.S. whiskey and bourbon brands are well known in most bar scenes.

Sources: ATOs; Ministry of Agriculture, Forestry and Fisheries; Ministry of Economy, Trade and Industry; Ministry of Finance; Japan Frozen Food Association; Pet Food Manufacturers Association; Fuji Keizai; Brewers Association of Japan. Note: The 2009 market size is an estimate made by ATO.

V. Key Tables and Charts

These following tables and charts are included to provide U.S. exporters with a better understanding of Japanese food market and economy.

Table A. Key Trade & Demographic Information

<i>Data is for 2009</i>	
Agricultural Imports from all Countries (\$Mil)/U.S. Market Share (%)	\$66,233 / U.S. 22.49%
Consumer Food Imports from all Countries (\$Mil)/U.S. Market Share (%)	\$24,769 / U.S. 20.79%
Edible Fishery Imports from all Countries (\$Mil)/U.S. Market Share (%)	\$12,912 / U.S. 9.38%
Total Population (Millions)/Annual Growth Rate (%) ¹	127.51. /- 0.14%
Number of Major Metropolitan Areas ²	12
Per Capita Gross Domestic Product (U.S. Dollars) ³	\$32,700 est.
Unemployment Rate (%) ⁴	5.1%
Percent of Female Population Employed ⁵	46.2%
Exchange Rate (Japan Yen per US\$) ⁶	93.52 (Ann. Avg. in 2009)

Statistics Bureau, Ministry of Internal Affairs and Communication; U.S. Bureau of Labor Statistics

1/Total Population/Annual Growth Rate: <http://www.stat.go.jp/english/data/jinsui/2009np/index.htm>

2/Population by city: http://www.soumu.go.jp/menu_news/s-news/01gyosei02_01000001.html

3/ CIA World Fact book, and the National Institute of Population and Social Security Research

GDP Per Capita: <https://www.cia.gov/library/publications/the-world-factbook/geos/ja.html>

4/Unemployment Rate: <http://www.stat.go.jp/english/data/roudou/154b.htm>

5/Percent of Female Population Employed(15 years old or older): <http://www.stat.go.jp/english/data/roudou/154b.htm>

6/Exchange Rate: http://www.customs.go.jp/toukei/info/index_e.htm

Table B. Consumer Food and Edible Fishery Product Imports

Japanese Imports (in Millions of Dollars)	Imports from the World			Imports from the U.S.			U.S. Market Share %		
	2007	2008	2009	2007	2008	2009	2007	2008	2009
CONSUMER-ORIENTED AGRICULTURAL TOTAL	23,964.73	26,831.35	24,769.13	4,525.64	5,337.64	5,148.33	18.88	19.89	20.79
Snack Foods (excl Nuts)	518.78	590.07	533.36	40.51	41.25	41.06	7.81	6.99	7.70
Breakfast Cereals & Pancake Mix	16.32	16.30	16.68	2.72	2.31	3.78	16.63	14.16	22.68
Red Meats, Fresh/Chilled/Frozen	5,972.38	6,874.53	6,414.47	1,493.35	2,133.85	2,101.82	25.00	31.04	32.77
Red Meats, Prepared/Preserved	2,027.34	2,177.81	2,270.14	248.75	313.67	335.70	12.27	14.40	14.79
Poultry Meat	752.29	1,376.79	881.26	40.17	50.08	34.16	5.34	3.64	3.88
Dairy Products	553.93	669.41	426.19	74.56	130.12	67.22	13.46	19.44	15.77
Eggs & Products	123.53	166.18	141.92	31.15	42.61	39.59	25.22	25.64	27.89
Fresh Fruit	1,577.65	1,843.38	2,014.19	414.96	418.58	386.57	26.30	22.71	19.19
Fresh Vegetables	661.93	594.30	623.37	98.65	89.88	87.12	14.90	15.12	13.98
Processed Fruit & Vegetables	3,430.39	3,399.11	3,360.86	612.46	674.30	689.91	17.85	19.84	20.53
Fruit & Vegetable Juices	783.53	806.09	610.21	135.92	130.60	106.29	17.35	16.20	17.42
Tree Nuts	347.46	345.73	298.43	212.05	199.62	164.82	61.03	57.74	55.23
Wine & Beer	1,317.61	1,406.96	1,142.50	76.26	79.36	72.00	5.79	5.64	6.30
Nursery Products & Cut Flowers	509.83	536.35	542.13	8.68	8.24	7.68	1.70	1.54	1.42
Pet Foods (Dog & Cat Food)	681.65	796.45	777.18	175.01	199.72	205.09	25.67	25.08	26.39
Other Consumer-Oriented Products	3,848.45	4,226.99	3,902.98	817.12	769.90	756.44	21.23	18.21	19.38
FISH & SEAFOOD PRODUCTS	12,763.90	14,100.15	12,912.16	1,171.04	1,513.83	1,210.84	9.17	10.74	9.38
Salmon, Whole/ Eviscerated/Canned	756.44	798.34	897.01	94.90	95.92	122.51	12.55	12.01	13.66
Crustaceans	3,673.02	3,828.60	3,579.73	67.25	112.59	87.82	1.83	2.94	2.45
Surimi (Fish Paste)	706.58	1,053.98	676.14	256.14	371.08	197.8	36.25	35.21	29.25
Molluscs	1,252.23	1,288.43	1,230.86	45.56	44.94	44.32	3.64	3.49	3.60
Other Edible Fish & Seafood	4,197.71	4,560.11	4,076.36	416.92	523.88	388.58	9.93	11.47	9.53

AGRICULTURAL PRODUCT TOTAL	43,601.34	54,083.05	44,654.18	12,456.77	17,089.36	13,059.64	28.57	31.60	29.25
AGRICULTURAL, FISH & FORESTRY TOTAL	68,138.03	79,348.78	66,232.67	14,501.85	19,491.10	14,892.46	21.28	24.56	22.49

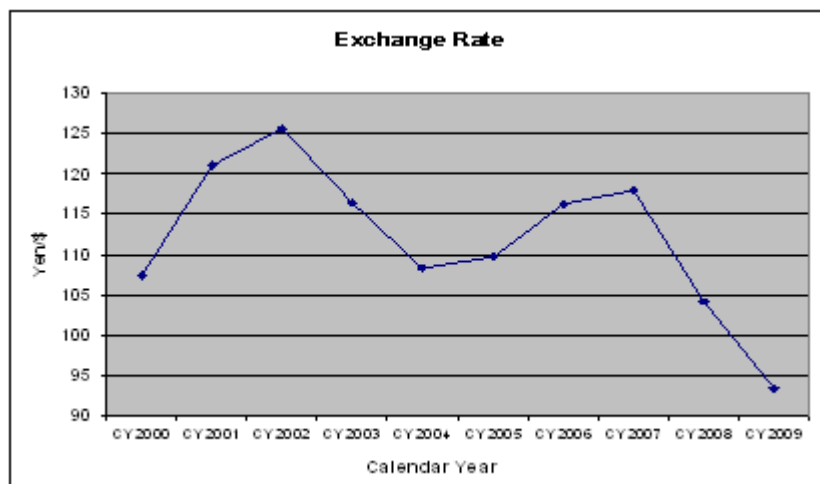
Source: Global Trade Atlas

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

Japan - Top 15 Suppliers							
CONSUMER-ORIENTED AGRICULTURAL				IMPORTS FISH & SEAFOOD PRODUCTS			
\$1,000	2007	2008	2009	\$1,000	2007	2008	2009
United States	4,525,641	5,337,642	5,148,327	China	2,695,145	2,424,245	2,244,646
China	4,213,625	3,695,781	3,643,747	United States	1,171,038	1,513,833	1,210,838
Australia	2,834,009	2,954,252	2,461,006	Thailand	971,524	1,115,022	1,099,663
Thailand	1,365,849	1,904,601	1,865,102	Chile	885,811	960,639	1,056,392
France	1,481,741	1,541,647	1,221,153	Russia	1,018,159	1,280,954	1,026,806
Canada	973,084	1,134,568	1,212,506	Indonesia	692,798	746,935	735,174
Philippines	705,232	956,126	1,121,295	Vietnam	688,417	755,583	702,366
Brazil	963,366	1,550,987	1,036,754	Korea, South	526,323	640,660	682,068
New Zealand	1,047,432	1,197,787	1,035,276	Norway	441,791	576,615	627,953
Denmark	866,155	975,290	837,030	Taiwan	552,137	564,388	473,551
Korea, South	466,379	542,303	617,033	Canada	410,963	447,732	374,960
Italy	533,742	652,868	615,443	India	299,697	310,294	260,234
Mexico	471,779	581,162	532,095	Australia	298,820	293,856	230,877
Netherlands	471,159	498,033	437,999	Mauritania	102,513	113,195	143,000
Singapore	343,924	464,224	384,772	Philippines	166,632	192,737	141,433
Other	2,701,617	2,844,083	2,599,589	Other	1,842,132	2,163,465	2,045,181
World	23,964,734	26,831,354	24,769,127	World	12,763,900	14,100,153	12,912,161

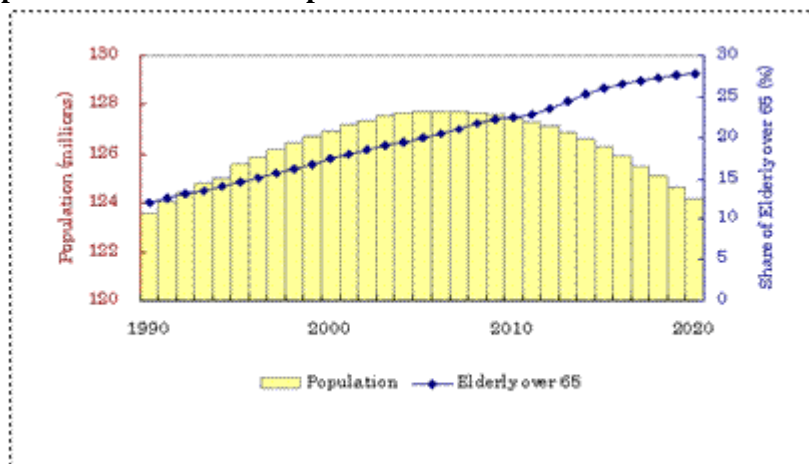
Source: Global Trade Atlas

Chart A. Exchange Rate (JPY per US\$) 1997-2009



Source: Ministry of Finance

Chart B. Japan's Population Growth and Expected Decline



Source: National Institute of Population and Social Security Research

Appendix A. Japanese Retailers

Table A-1: Top 10 Supermarkets (2009)

Rank	Company Name	Sales US\$ bil.	Location	Telephone/Fax URL	Address
1	Aeon Retail	19.79	Nationwide	Tel: 81(0)43-212-6042 Fax: 81(0)43-212-6849 www.aeon.info	1-5-1 Nakase Mihama-ku, Chiba 261-8515
2	Ito-Yokado	14.84	Nationwide	Tel: 81(0)3-6238-2111 Fax: 81(0)3-6238-3492 http://www.ityokado.co.jp	8-8, Nibancho Chiyoda-ku, Tokyo 102-8450,
3	Uny	12.29*	Nationwide	Tel: 81(0)587-24-8111 Fax: 81(0)587-24-8024 www.uny.co.jp	1 Amaike-Gotandacho, Inazawa, Aichi 492-8680
4	Daiei	10.58*	Nationwide	Tel: 81(0)3-6388-7100 Fax: 81(0)3-34433-9226 www.daiei.co.jp	2-2-20 Toyo Koto-ku, Tokyo 135-0016
5	Izumi	5.38*	Western Japan	Tel: 81(0)82-264-3211 Fax: 81(0)82-261-5895 www.izumi.co.jp	2-22, Kyobashi-cho, Minami-ku Hiroshima-shi, Hiroshima 732-0828
6	Life Corp.	5.07	Kinki, Kanto	Tel: 81(0)6-6815-2600 http://www.lifecorp.jp	1-19-4 Higashinakazima Higashiyodogawa-ku, Osaka, 533-8558
7	Heiwado	4.12*	Kinki, Chubu	Tel: 81(0)749-26-9610 Fax: 81(0)749-23-3254 http://www.heiwado.jp/	31, Koizumi-cho Hikone-shi, Shiga 522-0043
8	Izumiya	3.99*	Kinki	Tel: 81(0)6-6657-3379 Fax: 81(0)6-6657-3398 www.izumiya.co.jp	1-4-4 Hanazono-Minami Nishinari-ku, Osaka 557-0015
9	Yorkbenimaru	3.77	Tohoku, Kanto	Tel: 81(0)24-924-3211 Fax: 81(0)-24-924-3177 http://www.yorkbeni.co.jp/	18-2 Asahi 2-chome Koriyama, Fukushima 963-8543
10	Valor	3.73*	Chubu, Hokuriku	Tel: 81(0)572-0860	661-1 Oharicho Tajimi, Gifu 507-0062

				http://www.valor.co.jp	
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Sources: Nikkei Marketing Journal "Retail Sector Ranking 2009" (June 30, 2010),

* Sales are shown by consolidated base.

Table A-2: Top 10 Department Stores (2009)

Rank	Company Name	Sales US\$ bil.	Location	Telephone/Fax URL	Address
1	Takashimaya	9.39*	Nationwide	Tel: 81(0)6-6631-1101 Fax: 81(0)6-6632-5195 www.takashimaya.co.jp	5-1-5 Namba, Chuo-ku, Osaka 542-8510
2	Sogou-Seibu	9.29	Nationwide	http://www.sogo-seibu.co.jp/	5-25, Ni-Bancho, Chiyoda-ku, Tokyo 102-0084
3	Mitsukoshi	5.98	Nationwide	Tel: 81(0)3-3241-3311 Fax: 81(0)3-3242-4559 www.mitsukoshi.co.jp	1-4-1 Nihonbashi- Muromachi Chuo-ku, Tokyo 103-8001
4	Daimaru (currently, Daimaru- Matsuzakaya)	4.53	Nationwide	www.daimaru.co.jp	2-18-11 Kiba, Koto-ku, Tokyo 135-0042
5	Isetan	4.25	Nationwide	Tel: 81(0)3-3352-1111 Fax: 81(0)3-5273-5321 www.isetan.co.jp	3-14-1, Shinjyuku Shinjyuku-ku, Tokyo, 160-8011
6	Hankyu-Hanshin	4.17	Kinki, Kanto	http://www.hankyu-hanshin-dept.co.jp/	8-7 Kakuda-cho Kita-ku, Osaka 530-8350
7	Kintetsu	3.30*	Kinki	Tel: 81(0)6-6624-1111 www.d-kintetsu.co.jp/	1-1-43 Abenosuji Abeno-ku, Osaka 545-8545
8	Tokyu	2.71*	Kanto	Tel: 81(0)3-3711-010 Fax: 81(0)3-3496-7200 www.tokyu-dept.co.jp	1-21-25 Kamimeguro Meguro-ku, Tokyo 153-8577
9	Matsuzakaya (currently, Daimaru- Matsuzakaya)	2.50	Nationwide	http://www.matsuzakaya.co.jp/	2-18-11 Kiba, Koto-ku, Tokyo 135-0042
10	Tobu	1.72	Kanto	http://www.tobu-dept.jp/	1-1-25 Nishi-Ikebukuro, Toshima-ku, Tokyo 171-8512

Sources: Nikkei Marketing Journal "Retail Sector Ranking 2009" (June 30, 2010).

* Sales are shown by consolidated base.

Table A-3: Top 10 Convenience Stores (2009)

Rank	Store Name (Parent)	Sales US\$ bil	Location	Telephone/Fax URL	Address
1	Seven-Eleven (Seven & i Holdings)	29.78	Nationwide	Tel: 81(0)3-6238-3000 http://www.7andi.com/	2-8-8 Chiyoda Chiyoda-ku, Tokyo 102-8452
2	Lawson (Mitsubishi)	17.82	Nationwide	Tel: 81(0)3-5435-2770 www.lawson.co.jp	1-11-2 Ohsaki Osaki Shinagawa-ku Tokyo 141-8643
3	Family Mart (Itochu)	13.62	Nationwide	Tel: 81(0)3-3989-6600 Fax: 81(0)3-5396-1810 www.family.co.jp	3-1-1 Higashi Ikebukuro, Toshima-ku, Tokyo 170-6017
4	CircleK Sunkus (Uny)	9.11	Nationwide	Tel: 81(0)3-6220-9000 http://www.circleksunkus.jp/english/	5-24 Harumi 2-chome, Chuo-ku, Tokyo 104-8538
5	Mini-Stop (AEON)	3.31	Kanto, Tokai, Kinki	Tel: 81(0)43-212-6471 Fax: 81(0)43-212-6746	1-5-1 Nakase Mihama-ku, Chiba 261-

				www.ministop.co.jp	8540
6	Daily Yamazaki (Yamazaki)	2.29	Nationwide	Tel: 81(0)47-323-0001 Fax: 81(0)47-324-0082 www.daily-yamazaki.co.jp	Sun Plaza 35 Bldg., 1-9-2 Ichikawa, Ichikawa-shi, Chiba 272-8530
7	Seiko Mart	1.77	Hokkaido	Tel: 81(0)11-511-2796 Fax: 81(0)11-511-2834 www.seicomart.co.jp	421, Nishi 5, Minami 9 Chuo-ku, Sapporo Hokkaido 064-8620
8	AM/PM Japan (Currently Family Mart)	1.50	Nationwide	Tel: 81(0)6-6430-5970 Fax: 81(0)6-6430-5978 www.ampm.co.jp	3-1-1 Higashi Ikebukuro, Toshima-ku, Tokyo 170- 6017
9	Three F Co., Ltd.	1.14	Kanto	Tel: 81(0)45-651-2111 www.three-f.co.jp/	17 Nihon-Odori Naka-ku, Yokohama Kanagawa 231-8507
10	Popular	1.02	Nationwide	Tel : 81(0)82-837-3500 Fax : 81(0)82-837-3540 http://www.poplar-cvs.co.jp/	665-1 Oazakuchi Asa-cho, Asakita-ku, Hiroshima-shi, Hiroshima 731-3395

Sources: Nikkei Marketing Journal "Convenience Store Ranking 2009" (July 28, 2010). Sales are shown by consolidated base.

Table A-4: Top 10 Food Wholesalers (2009)

Rank	Company Name	Sales US\$ bil	Location	Telephone/Fax URL	Address
1	Kokubu	15.26*	Nationwide	Tel: 81(0)3-3276-4000 Fax: 81(0)3-3271-6523 www.kokubu.co.jp	1-1-1 Nihonbashi Chuo-ku, Tokyo 103-8241
2	Ryoshoku	14.81*	Nationwide	Tel: 81(0)3-3767-5111 Fax: 81(0)3-3767-0421 www.ryoshoku.co.jp	Tokyo Ryutsu Center Annex 6-1-1 Heiwajima, Ota-ku, Tokyo 143-6556
3	Nippon Access	14.55*	Nationwide	Tel: 81(0)3-6859-1111 Fax: 81(0)3-3410-4626 www.nippon-access.co.jp	3-1-3 Ikejiri Setagaya-ku, Tokyo 154-8501
4	Kato Sangyo	6.99*	Nationwide	Tel: 81(0)798-33-7650 Fax: 81(0)798-22-5637 www.katosangyo.co.jp	9-20, Matsubara-cho Nishinomiya-shi, Hyogo, 662-8543
5	Itochu Foods	6.65*	Nationwide	Tel: 81(0)6-6947-9811 Fax: 81(0)6-6947-9510 www.itochu-shokuhin.com	2-2-22 Shiromi Chuo-ku, Osaka 540-8522
6	Mitsui Foods	5.47*	Nationwide	Tel: 81(0)3-3551-1211 Fax: 81(0)3-5541-7467 http://www.mitsuifoods.co.jp/	2-10-9 Hacchobori Chuo-ku, Tokyo 104-8277
7	Nihon Shurui Hanbai	5.18*	Nationwide	Tel: 81(0)3-4330-1735 Fax: 81(0)3-3552-6955 www.nishuhan.co.jp	International Division 1-25-4 Shinkawa, Chuo-ku, Tokyo 104-0033
8	Asahi Shokuhin	3.89*	Nationwide	Tel: 81(0) 88-882-7111 www.asask.co.jp	2-15-5 Minami Harimaya-cho, Kochishi, Kochi 780-8505
9	Meidi-ya Shoji	3.35	Nationwide	Tel: 81(0)3-3271-1111 Fax: 81(0)3-3273-6360 www.meidi-ya.co.jp	2-2-8, Kyobashi Chuo-ku, Tokyo 104-8302
10	Food Service Network	3.35*	Nationwide	Tel: 81(0)3-5652-6300 Fax: 81(0)3-5652-6310 www.fsnltd.co.jp	3-15-1 Nihonbashi Hamamachi, Chuo-ku, Tokyo 103-0007

Sources: Nikkei Marketing Journal "Wholesaler Ranking 2009" (August 4, 2010). *Sales are shown by consolidated base.

Appendix B. Japanese Food Service Companies

Table B-1: Top 10 Commercial Restaurant Food Service Companies (2009)

Rank	Company Name	Sales US\$ bil.	No. of Outlets	Location	Telephone/Fax URL	Address
1	McDonald's Japan	5.69	3,715	Nationwide	Tel: 81(0)3-3344-6251 Fax: 81(0)3-3344-6769 www.mcdonalds.co.jp	6-5-1 Nishi-Shinjuku Shinjuku-ku, Tokyo 163-1339
2	Skylark	2.64	2,295	Nationwide	Tel: 81(0)422-51-8111 Fax: 81(0)422-37-5240 www.skylark.co.jp	1-25-8 Nishi-Kubo Musashino-shi, Tokyo 180-8580
3	Nissin Health Care Food Service	1.80	4,260	Nationwide	Tel: 81(0)3-3287-3611 Fax: 81(0)3-3287-3612 www.nifs.co.jp	Tokyo Bldg., 20F 2-7-3 Marunouchi Chiyoda-ku, Tokyo, 100-6420
4	Zensho	1.68	1,405	Nationwide	Tel: 81(0)3-5783-8850 http://www.zensho.co.jp/en/	2-18-1 Konan Minato-ku, Tokyo 108-0075
5	Plenus	1.62	2,626	Nationwide	Tel: 81(0)92-452-3600 www.plenus.co.jp/	1-19-21 Kamimuta Hakata-ku, Fukuoka 812-8580
6	Kentucky Fried Chicken Japan	1.50	1,505	Nationwide	Tel: 81(0)3-3719-0231 Fax: 81(0)3-5722-7240 http://www.kfc.co.jp/	1-15-1 Ebisu-Minami Shibuya-ku, Tokyo 150-8586
7	Monterozza	1.48	1,717	Nationwide	Tel: 81(0)422-36-8888 Fax: 81(0)422-36-8988 www.monterozza.co.jp	1-17-3 Nakamachi Musashino-shi, Tokyo 180-0006
8	Reins International	1.34	1,231	Nationwide	Tel: 81(0)3-5544-2001 www.reins.co.jp/	Ark Yagi Bldg. 1-8-7 Roppongi, Minato-ku, Tokyo 106-0032
9	Duskin (Mister Donut)	1.31	1,341	Nationwide	Tel: 81(0)6-6387-3411 Fax: 81(0)6-6821-5357 www.duskin.co.jp	1-33 Toyotsu-cho Suita-shi, Osaka 564-0051
10	Honke Kamadoya	1.15	2,155	Nationwide	Tel: 81(0)78-251-3050 Fax: 81(0)78-251-3146 www.honkekamadoya.co.jp	1-1-5 Nunobikimachi, Chuo-ku, Kobe, Hyogo 651-0097

Sources: Nikkei Marketing Journal "Food Service Ranking 2009" (May 17, 2010). Sales are shown by consolidated base.

Table B-2: Top 5 Institutional Food Service Companies (2009)

Rank	Company Name	Sales US\$ bil.	Location	Telephone/Fax URL	Address
1	Nisshin Healthcare Food Service	1.80	Nationwide	Tel: 81(0)3-3287-3611 Fax: 81(0)3-3287-3612 www.nifs.co.jp	Tokyo Bldg., 20F 2-7-3 Marunouchi Chiyoda-ku, Tokyo, 100-6420
2	Aim Services	1.02	Nationwide	Tel: 81(0)3-3592-3721 Fax: 81(0)3-3502-6580 www.aimservices.co.jp	1-1-15 Nishi-Shimbashi Minato-ku, Tokyo 105-0003
3	Green House	0.86	Kanto	Tel: 81(0)3-3379-1211 http://www.greenhouse.co.jp/	3-2-17 Nishishinjuku Shinjuku-ku, Tokyo 163-1477
4	Seiyo Food Compass Group	0.83	Nationwide	Tel: 81(0)3-3984-0281 Fax: 81(0)3-3983-3475 www.seiyofood.co.jp	3-13-3, Higashi Ikebukuro Toshima-ku, Tokyo, 170-0013
5	Fuji Sangyo	0.68	Nationwide		5-32-7 Shinbashi

				Tel: 81(0)3-5400-6111 http://www.fuji-i.com/	Minato-ku, Tokyo, 105-0004
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Sources: Nikkei Marketing Journal "Food Service Ranking 2009" (May 17, 2010). Sales are shown by consolidated base.

Table B-3: Top 5 Home Meal Replacement Sector and Bento Producers/Marketers (2009)

Rank	Company Name	Sales US\$ bil	No. of Outlets	Location	Telephone/Fax URL	Address
1	Plenus	1.62	2,626	Nationwide	Tel: 81(0)92-452-3600 www.plenus.co.jp/	1-19-21 Kamimuta Hakata-ku, Fukuoka 812-8580
2	Honke Kamadoya	1.15	2,155	Nationwide	Tel: 81(0)78-251-2308 Fax: 81(0)78-251-3146 www.honkekamadoya.co.jp	1-1-5 Nunobikimachi Chuo-ku, Kobe, Hyogo 651-0097
3	Four Seeds (Pizza-La)	0.66	712	Nationwide	Tel: 81(0)3-3409-6000 Fax: 81(0)3-5466-4400 www.pizza-la.co.jp	5-12-4 Minami Aoyama Minato-ku, Tokyo, 107-0062
4	Rock Field	0.50	309	Nationwide	Tel: 81(0)78-435-2800 Fax: 81(0)78-435-2805 http://www.rockfield.co.jp/	Uozakihama-cho Higashinada-ku, Kobe Hyogo 658-0024
5	Origin Toshu	0.49	582	Nationwide	Tel: 81(0)3-3305-0180 Fax: 81(0)3-3305-0330 http://www.toshu.co.jp/	15-2 3-2-4 Sengawacho Chofu, Tokyo 182-0002

Sources: Nikkei Marketing Journal "Food Service Ranking 2009" (May 17, 2010). Sales are shown by consolidated base.

Appendix C. Japanese Food Manufacturers by Product Category

Table C-1 Frozen Foods

Company Name	Share %	Main Product
Nichirei	20.7	Fried rice and vegetables
TableMark	15.7	Noodles, fried shrimp, fried fish, snacks
Maruha Nichiro Holdings	14.1	A variety of snacks (e.g. pizza), fried rice
Ajinomoto Frozen Foods	12.2	A variety of processed foods
Nippon Suisan Kaisha	8.8	Seafood

Table C-2 Ham & Sausage

Company Name	Share %	Main Products
Nippon Meat Packers	21.4	Meat, meat product
Itoham Foods	19.2	Ham, meat product
Marudai Food	16.8	Ham, meat product
Prima Meat Packers	9.6	Meat, meat product
Yonekyu	8.5	Meat products

Table C-3 Ice cream		
Company Name	Share %	Main Products
Lotte	17.2	Ice cream, snack
Morinaga	13.0	Milk, yogurt
Ezaki Glico	12.0	Ice cream, snack
Meiji Dairies Corp	10.5	Milk, yogurt
Haagen-daz	9.9	Ice cream

Table C-4 Instant Noodle		
Company Name	Share %	Main Product
Nissin Food Products	40.2	Flour
Toyo Suisan	20.0	Seafood
Sanyo Foods	12.3	Instant noodles
Myojo Foods	8.8	Instant noodles
Acecook	8.4	Instant noodles

Table C-5 Beer		
Company Name	Share %	Main Product
Kirin Breweries	37.7	Beer
Asahi Breweries	37.5	Beer
Suntory	12.3	Spirits, wine, beer
Sapporo Breweries	11.7	Beer
Orion Breweries	0.9	Shochu

Table C-6 Soft Drinks		
Company Name	Share %	Main Product
Coca-Cola	29.1	Non-alcoholic drinks

Suntory Food	21.0	Non-alcoholic drinks
Kirin Beverage	10.6	Non-alcoholic drinks
Ito En	9.6	Green tea
Asahi Soft Drinks	8.0	Non-alcoholic drinks

Table C-7 Tonic Drinks/OTC Preparations

Company Name	Share %	Main Product
Taisho Pharmaceutical	40.0	Tonic drinks
Sato Pharmaceutical	11.7	Health drinks
Taiho Pharmaceutical	8.0	Amino acid products
Takeda Pharmaceutical	7.3	Tonic drinks
SSP	5.5	Tonic drinks

Appendix C Sources: Nikkei Sangyo Shimbun, "Domestic Share Survey 2009" (July 27, 2010)

Appendix D. Key Contacts

Table D-1: 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
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Table D-2: U.S. State Government Offices in Japan

Organization Name	Telephone/Fax URL	Address
Alabama	Tel: 81(0)3-3655-3508 Fax: 81(0)3-5232-3850 www.ado.state.al.us	Minami Aoyama Bldg., 5F 1-10-2 Minami Aoyama Minato-ku, Tokyo 107-0062
Alaska	Tel: 81(0)3-3556-9621 Fax: 81(0)3-3556-9623 www.alaska.or.jp	Room 307, Central Bldg. 22-1, Ichiban-cho Chiyoda-ku, Tokyo 102-0082
Arizona	Tel: 81(0)3-3492-8951 Fax: 81(0)3-3492-8951 http://www.azcommerce.com/	Room 414, Dormir-Gotanda-En-Maison 2-9-7 Nishi-Gotanda Shinagawa-ku, Tokyo 141-0031
Arkansas	Tel: 81(0)3-5447-7471 Fax: 81(0)3-5447-7472 www.arkansas-jp.org / http://arkansasedc.com	Room 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 Sakata Yukio Nishiwaseda Shinjuku-ku, Tokyo 169-0051
Florida	Tel: 81(0)3-3230-0505 Fax: 81(0)3-5213-0507 www.eflorida.com	Sakamiya #2 Bldg., 5F 10 Ichibancho Chiyoda-ku, Tokyo 102-0082
Georgia	Tel: 81(0)3-3539-1676 Fax: 81(0)3-3504-8233 www.global-georgia.org	Bureau Toranomon, 205 2-7-16 Toranomon, Minato-ku, Tokyo 105-0001
Idaho	Tel: 81(0)7-8854-7270 Fax: 81(0)7-8854-7271 www.idahojapan.org	2-5-602 Mikage Higashinada-ku, Kobe 658-0056
Illinois	Tel: 81(0)3-3268-8011 Fax: 81(0)3-3268-8700 www.commerce.state.il.us	2-1 Ichigaya, Ichigaya Sadoharacho Shinjuku-ku, Tokyo 162-0842
Indiana	Tel: 81(0)3-3234-3875 Fax: 81(0)3-3234-3886 http://www.indiana-japan.org	Ichinose Bldg., 5F 3-5-11, Koji-machi Chiyoda-ku, Tokyo 102-0083
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
Kansas	Tel: 81(0)3-3239-2844 Fax: 81(0)3-3239-2848 www.kansascommerce.com	Kioicho WITH Bldg., 4F 3-32 Kioicho Chiyoda-ku, Tokyo 102-0094
Kentucky	Tel: 81(0)3-3582-2334 Fax: 81(0)3-3588-1298 www.kentucky-net.com	Kurokawa Bldg., 8F 2-5-8 Akasaka Akasaka, Minato-ku, Tokyo 107-0052
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 231-0001
Missouri	Tel: 81(0)3-5724-3968 Fax: 81(0)3-5724-3967 http://www.missouri-japan.org/office.html	2-3-3-202, Koyamadai Shinagawa-ku, Tokyo
Montana	Tel: 81(0)96-385-0782 Fax: 81(0)96-381-3343	6-18-1, Suizenji

	http://agr.mt.gov/ / www.bigskyjapan.com	Kumamoto 862-8570
North Carolina	Tel: 81(0)3-3435-9301 Fax: 81(0)3-3435-9303 www.nccommerce.com/ / http://www.nctokyo.com/	Suzuki Bldg., 5F 3-20-4 Toranomom Minato-ku, Tokyo 105-0001
Ohio	Tel: 81(0)3-3499-2493 Fax: 81(0)3-3499-3109 http://ohio.gov/	Minami Aoyama First Bldg., 10F 7-8-1 Minami-Aoyama Minato-ku, Tokyo 107-0063
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, Tokyo 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
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 231-0001
Texas	Tel: 81(0)3-3400-1352 Fax: 81(0)3-3400-0570 www.state.tx.us	2-5-9 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 Toranomom Minato, Tokyo 105-0001
Washington	Tel: 81(0)3-5305 5035 Fax: 81(0)3-5305-5036 http://www.exportwashington.com/yunyukenzai/	5F Shin Tokyo Kaikan 1-34-6 Asagaya-minami Suginami-ku, Tokyo 166-0004
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 D-3: U.S. Trade Associations and Cooperator Groups in Japan

<i>Organization Name</i>	<i>Telephone/Fax URL</i>	<i>Address</i>
Alaska Seafood Marketing Institute	Tel: 81(0)3-3560-1812 Fax: 81(0)3-3560-1813 www.alaskaseafood.org	4-14-2912, Akasaka, Minato-ku, Tokyo, 107-0052
Almond Board of California	Tel: 81(0)3-5768-8411 Fax: 81(0)3-4520-5848 http://www.almondboard.com/	3-5-27 Roppongi, Minato-ku, Tokyo 106-0032
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 Softwood Japan Office	Tel: 81(0)3-3501-2131 Fax: 81(0)3-3501-2138 http://www.softwood.org http://www.americansoftwoods.jp	AIOS Toranomom 9F 1-6-12 Nishi Shinbashi Minato-ku, Tokyo 105-0003
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
	Tel: 81(0)3-3584-7019	Residence Vicountess, Suite 310

California Cherry Advisory Board	Fax: 81(0)3-3582-5076 www.calcherry.com	1-11-36 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)3-5770-7533 Fax: 81(0)3-5770-7534 www.calstrawberry.com	9-1-7-581 Akasaka Minato-ku, Tokyo 107-0052
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
Cherry Marketing Institute	Tel: 81(0)3-5770-7533 Fax: 81(0)3-5770-7534 http://www.choosecherries.com/	9-1-7-581 Akasaka Minato-ku, Tokyo 107-0052
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
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)6-4560-6206 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
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)3-5770-7533 Fax: 81(0)3-5770-7534 www.nwcherries.com	9-1-7-581 Akasaka Minato-ku, Tokyo 107-0052
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)3-5789-5398 Fax: 81(0)3-5789-5399 www.petfoodinstitute.org	Yebisu Garden Place Tower, 18F, 4-20-3 Yebisu Shibuya-ku, Tokyo 150-6018

Potato Board, U.S.	Tel: 81(0)3-3505-5737 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)3-3486-6831 Fax: 81(0)3-3486-7508 www.usarice.com http://www.usarice-jp.com/	Totate International Bldg., 2-12-19 Shibuya Shibuya-ku, Tokyo, 150-8343
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)3-5770-7533 Fax: 81(0)3-5770-7534 http://www.nwcherries.com/index.html	9-1-7-581 Akasaka Minato-ku, Tokyo 107-0052
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)3-5524-0300 Fax: 81(0)3-5524-1102 www.wga.com	Nihon Kochiku Bldg., 6F. 2-9-12 Kyobashi Chuo-ku, Tokyo 104-0031
Western Pistachio Association	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
Wheat Associates, U.S.	Tel: 81(0)3-3582-7911 Fax: 81(0)3-3582-7915 www.uswheat.org	Toshin Tameike Bldg., 5F 1-1-14 Akasaka Minato-ku, Tokyo 1070052
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 D-5: 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, Labour 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/atlanta/	245 Peachtree Center Avenue NE, Marquis One Tower Suite 2208, Atlanta, GA 30303
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 D-6: 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	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 Chuo-ku, 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 Cannery Assoc.	Tel: 81(0)3-5256-4801 Fax: 81(0)3-5256-4805 www.jca-can.or.jp	Kazu Kanda Bldg., 3F 10-2, Sho-cho Chiyoda-ku Tokyo 101-0042
Japan Dairy Industry	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

Assoc.		
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)3-3667-6671 Fax: 81(0)3-3669-2117 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)3-3639-9669 Fax: 81(0)3-3639-9667 www.nippon-sauce.or.jp	15-18 Kodenmacho Nihonbashi Chuo-cho, Tokyo 103-0001 * Need ID
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 D-7: 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 Hakozaicho 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)3-3350-9100 Fax: 81(0)3-3350-7960 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 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/	Bldg. 5 1-13-5 Toranomom 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/	Takeda Shinedobashi Bldg. 2 2-12-7 Nihonbashi Chuo-ku, Tokyo 103-0027

Table D-8: Japanese Associations - Distribution

Organization Name	Telephone/Fax URL	Address
National Assoc. of Supermarkets	Tel: 81(0)3-3255-4825 Fax: 81(0)3-3255-48267 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 Toranomom 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	2-16-18 Uchikanda Chiyoda-ku, Tokyo 101-0047

	www.gaishokukyo.or.jp	
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 2-5-11 Nihonbashi- Muromachi Chuo-ku, Tokyo 102-0022
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

Sector 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)

- *HRI Food Service Sector Report*

<http://www.fas.usda.gov/gainfiles/200903/146327420.pdf>

- *Retail Sector Report*

<http://www.fas.usda.gov/gainfiles/200811/146306425.pdf>

- *Food Processing Sector Report*

http://gain.fas.usda.gov/Recent%20GAIN%20Publications/Food%20Processing%20Ingredients_Tokyo%20ATO_Japan_11-19-2010.pdf

- *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 "Subject Text: FAIRS".

- *Japan Food Trends*

At the URL, <http://gain.fas.usda.gov/Pages/Default.aspx>, set your search to select "Country: Japan", and "Subject Text: Japan Food Trends".

- *Red Meat Export Requirements for Japan*

USDA Food Safety and Inspection Service (FSIS) provides a summary of red meat export requirements for Japan.
http://www.fsis.usda.gov/Regulations_&Policies/Japan_Requirements/index.asp

- *The National Organic Program - Export Arrangement with Japan*
USDA Agricultural Marketing Service provides useful information on National Organic Program and Export arrangement with Japan.
<http://www.ams.usda.gov/nop/NOP/TradeIssues/Japan.html>
- *Japan External Trade Organization (JETRO) Reports*
An 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>

Other FAS Japan Reports and other information

Other Japan-specific reports are available on the USDA Foreign Agricultural Service website.

<http://gain.fas.usda.gov/Pages/Default.aspx>,
<http://www.fas.usda.gov/scripts/attacherep/default.asp>