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Report Name: Market Updates for Japan's Frozen Food Industry

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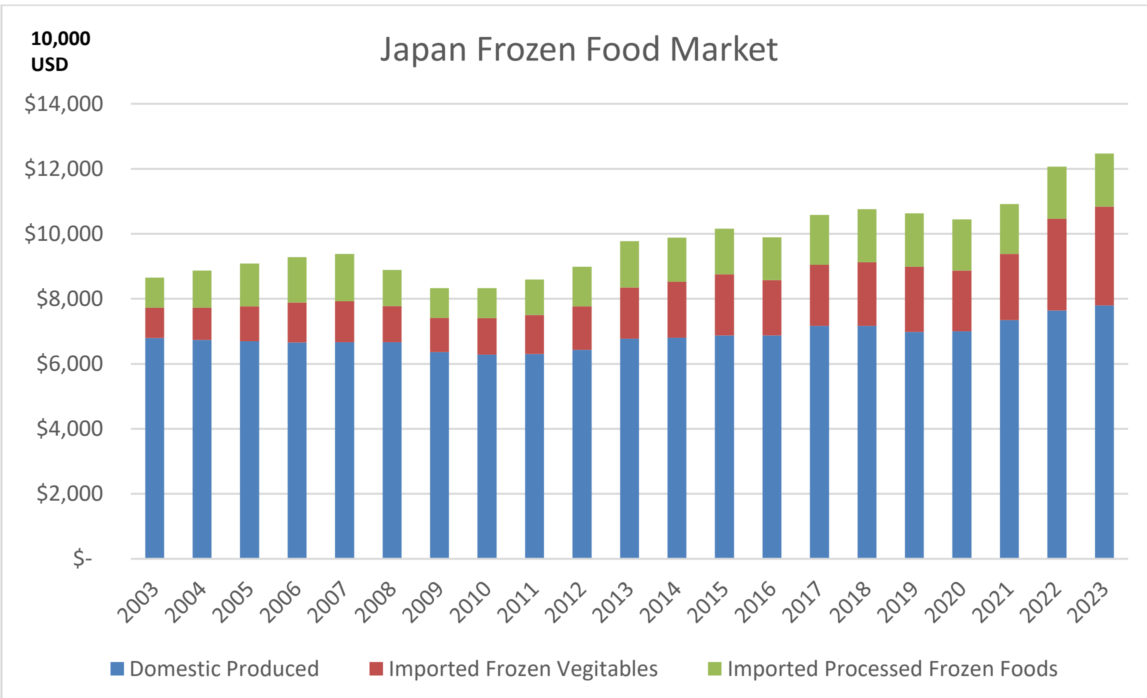
Report Highlights:

Sales in Japan’s frozen food market have been increasing year by year, reaching a record high in 2023. Several factors have led to this growth, including an increase in time spent at home during the COVID-19 pandemic, a rise in dual-income households leading to greater demand for convenience, and ongoing price inflation. Frozen foods in Japan are generally categorized into two types: prepared (processed) frozen foods and frozen ingredients such as vegetables and fruits. Thus far, imports have mainly consisted of frozen ingredients. The market is expected to continue expanding in the coming years. Although currency exchange rates and transportation costs have made it somewhat more difficult to export food ingredients for food service use, there is still a strong consumer willingness to spend on convenience and time-saving products. This trend suggests opportunities to explore new export strategies for the Japanese market.

Frozen Food Market Overview

According to the Yomiuri Shimbun, Japan's frozen food market in 2023 reached a record high of $12.5 billion, marking a 3.4 percent increase from the previous year.

Additionally, according to the Japan Frozen Food Association, imported frozen food accounts for 37.5 percent of the total market, with 65 percent consisting of frozen vegetables and 35 percent of prepared frozen foods. In the Japanese market the share of U.S. imported, prepared frozen foods is minimal; however, frozen vegetables account for a significant 25 percent market share. Since the COVID-19 pandemic, the frozen food market has been expanding annually, and compared to 2013, it has grown by approximately 30 percent over the past decade. This trend suggests that the market is expected to continue growing in the future.



Source: Japan Frozen Food Association

The domestic production of prepared frozen foods (fried items) grew from 1980 to the mid-1990s. However, since then that category has shown a gradually declined. Furthermore, the domestic production of prepared frozen foods (excluding fried items) rapidly increased from 1980 to the mid-2000s. Although production temporarily declined during the 2008 Lehman financial shock, it has since returned to a growth trend. The impact of the COVID-19 pandemic in 2020 was minimal, and in 2022, the volume of domestic production reached a record high.

In comparing the breakdown between domestic and imported products, domestically produced products were on a growth trend but have remained relatively flat since the late 1990s. For imported frozen foods, vegetables have been increasing since 1990, reaching 1.05 million MT in 2018. In particular, imports of frozen vegetables have surged since the 1980s and, despite fluctuations since the mid-1990s, have generally been on an upward trend, reaching a record high of 1.15 million MT in 2022. Imported, prepared frozen foods increased rapidly after 1997, peaking at 320,000 MT in 2007, and have since remained stable.

When looking at the trends in commercial usage and household consumption, commercial usage has generally been on a downward trend since 2002 and saw a significant during the COVID-19 pandemic in 2020. Since then, it has remained mostly flat. Household consumption, on the other hand, has generally been increasing since 2002 and saw a sharp rise during the pandemic in 2020, continuing a growth trend thereafter. Since 2021, household consumption has surpassed commercial usage. The growth in the frozen food market is mainly driven by domestically produced prepared frozen foods (excluding fried items) and imported, frozen vegetables.

Furthermore, while commercial usage significantly declined during the COVID-19 pandemic, household consumption increased substantially and has continued to grow steadily since. In terms of product categories, items such as noodles (*udon*, pasta, and ramen), as well as Chinese-style foods (*gyoza*, fried rice, and *shumai*) have seen significant growth.

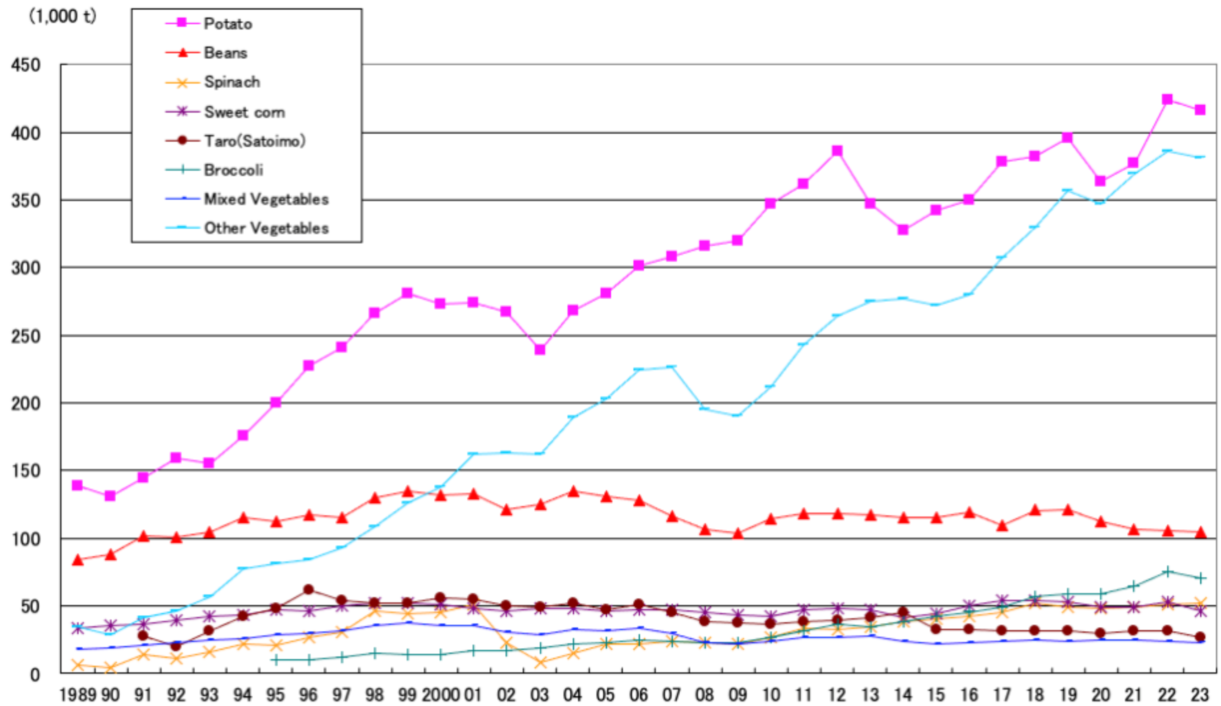
Consumption Value of Frozen Food by Category in Japan (2023)

<table>
<tr><th colspan="3">Value</th></tr>
<tr><th>Category</th><th>(10,000 USD)</th><th>Composition Rate</th></tr>
<tr><td>Fishery Products</td><td>$434</td><td>3.50%</td></tr>
<tr><td rowspan="2">Farm Products
(Imported)</td><td>$3,234</td><td>25.90%</td></tr>
<tr><td>($3,042)</td><td>(24.4%)</td></tr>
<tr><td>Livestock Products</td><td>$30</td><td>0.4%</td></tr>
<tr><td rowspan="2">Prepared Foods
(Imported)</td><td>$8,408</td><td>67.4%</td></tr>
<tr><td>$1,631</td><td>(13.11%)</td></tr>
<tr><td>Confectionery</td><td>$ 366</td><td>2.9%</td></tr>
<tr><td rowspan="2">Total
(Imported)</td><td>$12,472</td><td>100%</td></tr>
<tr><td>($4,673)</td><td>(37.5%)</td></tr>
</table>

Source: Japan Frozen Food Association

Imports

Volume of Imported Frozen Vegetables to Japan

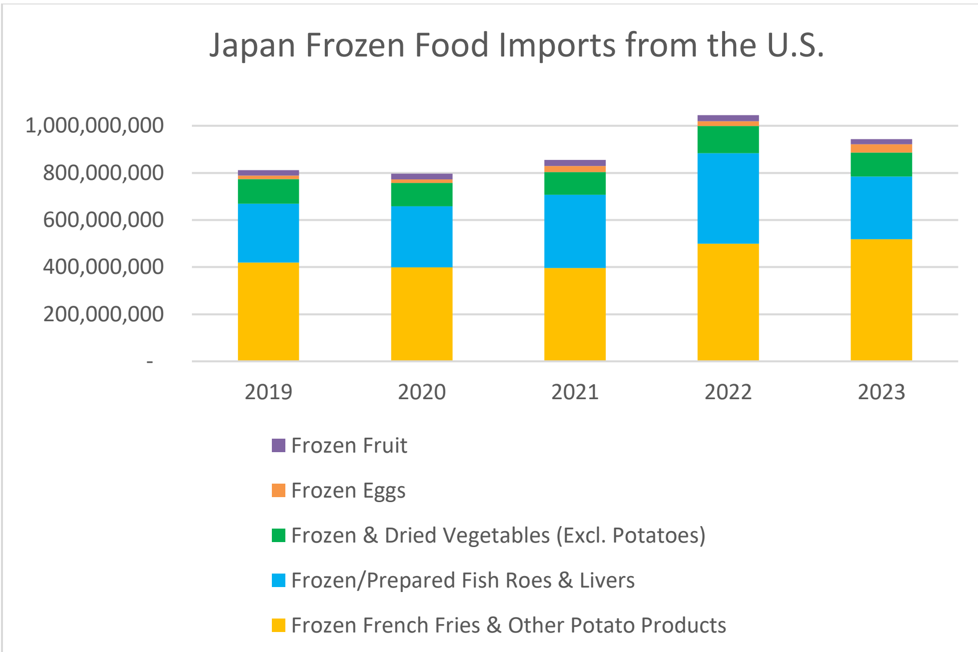


Source: Japan Frozen Food Association

In 2023, Japan imported $4.6 million of frozen foods from trading partners. Frozen potato products, including french fries, accounted for 19 percent of the total import amount followed by frozen and dried vegetables at 16 percent and 14 percent for fish roe. Overall frozen food imports have increased over the past decade. Compared to 2014, there has been a 176 percent increase imports. Such an increase can be heavily attributed to the number of households seeking easily prepared foods because of increased female participation in the workforce, in addition to more time spent at home associated with the COVID-19 pandemic. As a result, instead of fresh ingredients, many households began purchasing frozen foods to save time. Frozen vegetables from the United States have a 25 percent market share in Japan, valued at $898 million.

In 2023, the import volume of prepared frozen foods was 215,230 MT, with a total value of $1.63 billion. On a value basis, imports have been showing a growth trend for two consecutive years. Of the total import volume, 178,494 MT were for commercial use and 36,736 MT were for household use. In terms of value, products for commercial usage amounted to $1.29 billion, while household-use products totaled $340 million. This indicates a declining trend in household-use imports, whereas commercial-use imports are on the rise.
The main sources of imports are China, Thailand, and Vietnam. This is primarily because many Japanese, prepared frozen food manufacturers have their production facilities in these countries, resulting in a high volume of imports from neighboring Asian nations.

Frozen foods imported to Japan from the United States are predominantly frozen vegetables, including potatoes. Besides vegetables, a large portion consists of seafood products such as salmon roe and fish paste, in addition to frozen eggs. The frozen potatoes are mainly pre-cut varieties such as shoestring or wedge cuts, primarily intended for use as french fries. As for seafood, a significant amount comes from Alaska as wild-caught fish. Due to parasitic concerns, such as Anisakis parasites, these items are exported in frozen form. In terms of vegetables, Japanese retail stores often sell mixed vegetable (corn, green peas, and diced carrots) packages, utilizing an abundance of American-grown vegetables. In addition to mixed vegetables, frozen soybeans, sweet corn, and other legumes are also included.



Source: Japan Frozen Food Association

Sales Channels

Unsurprisingly, supermarkets represent the bulk of frozen food sales in Japan. They also have the widest range of available brands. The reason is because supermarkets and drugstores are able to buy in bulk and have considerable negotiating leverage with manufacturers. See GAIN JA2023-0052 for more information on Japan's retail market

Convenience stores represent one of the fastest growing sectors for frozen food sales in Japan. The growth in sales correlates strongly with the growth in the number of convenience stores, which currently stands at around 60,000 locations. Convenience stores typically charge a premium, which can be more than double the price of the same product sold in supermarkets. Convenience stores also offer opportunities to sell newly released and limited time products as consumers expect frequent product turnover because of the limited shelf space.

A relatively novel way of selling frozen foods in Japan is called "Microwave Restaurant," launched in 2022 by Nihon Access Co., Ltd., which is one of Japan's largest wholesale distributors. It is a 108-seat restaurant featuring display cases filled with around 320 types of frozen foods and about 70 varieties of ice cream. The restaurant is also equipped with 30 microwave ovens. Customers can freely take any frozen items they’re interested in from the freezers, heat them up in the microwaves and enjoy an all-you-can-eat experience for 90 minutes. While waiting for a microwave, the customers can also indulge in their favorite ice creams. The restaurant also offers a wide selection of frozen dishes developed in collaboration with renowned chefs, adding a gourmet element. In addition, there is a “Live Kitchen” corner where manufacturers rotate daily to serve samples of non-microwaved frozen foods and creative ice cream dishes. This innovative concept treats frozen food as a form of entertainment, and the restaurant is currently generating a lot of buzz and public interest.

Trend: **One Plate Frozen Dishes**

The market has been expanding in recent years due to the appeal of being able to enjoy a satisfying and well-balanced meal—combining staple foods like rice or pasta with side dishes such as vegetables—all in one serving, while also promoting a healthy image. Additionally, the convenience of being able to microwave the meal in its own tray, while requiring minimal clean-up is a major attraction.

According to Japan think-tank, data, the one plate meal market reached $130 million from January to December 2024, marking a 50.7 percent increase year-on-year. Compared to 2019, before the COVID-19 pandemic, the market has grown significantly—by a factor of 7.2. The appeal lies in the convenience and wide variety of menu options. These meals are desired by a broad range of demographics, including homemakers and senior citizens but also younger generations. Japanese analysts also point out that in the face of rising prices and growing consumer interest in saving money, the affordable price point—typically around$4—is a key factor that is also driving strong demand.

A sales representative from a major manufacturer adds, “During the pandemic, the surge in demand for home dining led more consumers to try these products. Even after that period, as people began shopping less frequently at supermarkets, frozen lunch boxes (meal sets) matched the growing need for bulk purchases.”

Trend: **Largest Japanese Retailer, Aeon, Opens Frozen Specialty Store**

With the concept of "transforming Japan's food scene through frozen food and creating a new dining lifestyle," the first and aptly named "@Frozen" store opened inside the AEON Style Shin-Urayasu MONA in Chiba Prefecture in 2023.

Focusing on five key dining scenes—*breakfast*, *lunch*, *dinner*, *snacks*, and *desserts*—the store offers a wide variety of authentic dishes from renowned restaurants and international cuisines. These selections are perfect not only for everyday meals but also for special occasions such as anniversaries and parties. The concept has been well-received by a broad customer base, including dual-income households, seniors, singles, and the Millennial and Gen Z generations.
As AEON's first such initiative, "@Frozen" also features a “Reward Full-Course” meal set, offering restaurant quality tastes that are difficult to recreate at home. These sets include an appetizer, soup, pasta, main dish, and dessert, available for around $50 to $60. In addition, the store boasts a constantly updated lineup of approximately 2,000 items, including about 300 varieties of famous sweets from across Japan, allowing customers to find frozen options for virtually any occasion.

Trend: **France-based Picard Frozen Foods**

The French frozen food brand PICARD entered the Japanese market in 2014 under the umbrella of the AEON Group. As of now, it operates 47 stores across Japan, including standalone locations. Around 200 different products are available in Japan. In addition to single-serving items that can be eaten simply by heating in a microwave, there are also many items suitable for house parties, such as "Salmon en Croûte" and "Frozen Foie Gras Slices." These products are visually appealing, and there is a noticeable trend of customers purchasing them for celebratory occasions such as Christmas and birthdays.

Although Picard takes a different approach than typical Japanese frozen foods, its products are priced between $4 to $20. Due to differences in ingredients and product types, making direct comparisons difficult; however, on average the prices are more than twice that of conventional, processed frozen foods. Due to their strong emphasis on quality, Picard does not view conventional frozen food makers as competitors, but rather bakeries and restaurants as the primary competition. One reason for Picard’s popularity is that, compared to dining out, it offers a more affordable alternative without compromising on quality.

Japan’s Top 3 Frozen Food Companies

Nissui Corporation
Nissui, founded in 1911, is one of Japan’s leading seafood companies with a history spanning over 100 years. The company operates with a dual focus on frozen foods and marine products.
In addition to strictly managing its manufacturing processes, Nissui places great emphasis on the quality of its ingredients. By adding value to raw seafood materials, the company follows a policy of "value creation," aiming to utilize every part of the resource without waste.
Nissui also actively engages in international business, maintaining overseas operations across Europe, North America, Asia, South America, and Oceania.

Maruha Nichiro Corporation
Maruha Nichiro is one of Japan’s largest seafood companies, which was established in 2007 through the merger of Maruha Group Inc. and Nichiro Corporation. It features both trading and food manufacturing divisions and is characterized by its borderless business operations across countries, regions, and product categories. The company has broad expertise in its marine products business, handling over 700,000 tons of diverse seafood annually. It is also deeply involved in aquaculture and is recognized as a pioneer in the farming of bluefin tuna.
In the frozen food sector, the company offers a wide range of differentiated products tailored to various needs, including elder care.

Ajinomoto Co., Ltd

Ajinomoto Co., Ltd has strength in the Chinese cuisine and fried chicken categories for both household and commercial use. One of its most well-known products, Ajinomoto frozen *gyoza* (dumplings), has been Japan's top-selling frozen *gyoza* for 18 consecutive years, solidifying its dominant market position. The Ajinomoto Group employs approximately 35,000 people globally, with a wide network of operations in Japan and around the world. While working to enhance collaboration within its various operations, the company is consolidating domestic production and placing a strong emphasis on its highly profitable overseas operations. Ajinomoto is committed to delivering products that not only cater to local tastes but also contribute to improved nutrition. As a result, the company's global expansion is expected to continue gaining momentum in the years to come.

Regulations

For further information about Japan's food regulations, please visit Japan's Ministry of Health, Labour, and Welfare (MHLW) link.

Information for U.S. Exporters

U.S. exporters seeking to enter the Japanese market are first advised to review the information available on www.usdajapan.org. The Export Guidance page includes links to the annual Food and Agricultural Imports Regulations and Standards (FAIRS) country and certificate reports, which describe Japan's requirements for imported products. For more information, please contact the USDA Agricultural Trade Office (ATO) Osaka at atoosaka@usda.gov.

Attachments:

No Attachments.