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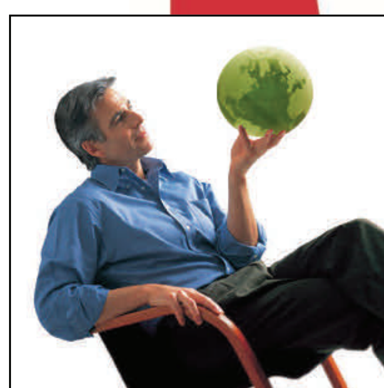
International Markets Bureau

MARKET INDICATOR REPORT | JUNE 2012

Ethnic Foods
in Japan

Source: Mintel, 2012.



Growing Forward

Canada

MARKET SNAPSHOT

- Japanese consumers, both young and old, are seeking high quality, safe, convenient and innovative products that appeal to their desire for new experiences.
- With an aging population, healthy and nutritious products are in high demand.
- Globalization and greater exposure to foods from around the world have allowed Japanese consumers to experience new flavours. Their palates are expanding, providing food manufacturers an opportunity to diversify and introduce new products with new flavours.
- Salty flavours are popular, but alternative flavours, such as vinegar and spices, are on the rise, as Japanese consumers become aware of the dangers of over-consuming salt. Cheese, chilli pepper, black pepper, and horseradish are also gaining popularity.
- Consumer confidence in Japan was low in 2011 due to the Tohoku earthquake and tsunami, resulting in less overall spending (Euromonitor International). In addition, insecurity resulting from the global financial downturn caused grocery shoppers to re-evaluate their shopping preferences, leading to a strong focus on getting value-for-money (not just low prices). This climate provides opportunities for those who can successfully find the 'sweet spot,' where a product or service meets or exceeds quality expectations, but at a price that is slightly less than expected.

INSIDE THIS ISSUE

Source: *Shutterstock.*

PROCESSED AND PACKAGED FOOD

Japan is Canada's second-largest agricultural export market. According to the Global Trade Atlas, in 2011 Canada exported US$3.9 billion worth of agricultural goods to Japan. As a net importer of processed food, Japan imports a wide variety, from over 160 countries. Japan has consistently been the second-most important destination for Canadian processed food over the past five years, and attracts over 7% of Canada's processed food exports.

Food purchases represent the second-biggest expense for Japanese families, after housing. In 2011, food expenditures by Japanese consumers amounted to US$3,735 per capita, amounting to a total of US$474 billion spent on food (Euromonitor). By 2013, Japanese consumers are expected to spend US$359 billion on food, a 4% decline from 2008. Despite this reduction, Japan still ranks third in the world for spending on food and continues to be a large market for processed and packaged food.

Japan is a niche market for high-end, packaged food manufacturers. The market size of some high-end packaged food, such as confectionery, bakery, ice cream and spreads, will remain stable to 2013. Other products, like dairy and snack bars, are expected to grow by 14% and 10%, respectively, by 2013. Japan is a significant buyer of high-end products with large profit margins. For example, the relatively expensive organic foods segment of packaged food, popular among the Japanese, is expected to continue to grow through 2013.

Several key factors are influencing the processed and packaged food sector in Japan: the weak economy, the rise in convenience-oriented living, and concern for health and food safety. Japanese consumers are also becoming more price-sensitive. As consumers look to save money, they are turning to more processed and frozen foods and private labels are becoming increasingly attractive. When private label products first appeared in Japan, they were seen as synonymous with cheap products. However, Japanese consumers have now welcomed private label products, which are promoted as simple and functional choices. Many consumers have begun to prefer private label products offered by supermarkets, over branded competitors.

Market Sizes of Japan Packaged Food Categories – Retail Value in US$ millions
Current 2011 Prices – Fixed 2011 Exchange Rates

Categories	2009	2010	2011	2012	2013
Packaged Food	232,532.1	230,155.1	225,888.1	228,132.9	229,344.3
Baby Food	1,319.0	1,313.1	1,284.1	1,265.1	1,253.7
Bakery	33,551.5	32,938.3	31,960.2	32,544.8	32,718.7
Canned/Preserved Food	8,135.5	8,013.4	8,284.7	8,201.4	8,309.1
Chilled Processed Food	67,634.0	67,005.5	65,096.9	64,029.4	63,841.9
Confectionery	10,155.7	10,002.9	9,758.8	9,965.3	9,909.0
Dairy	24,640.6	24,607.6	24,251.2	25,464.1	26,007.2
Dried Processed Food	31,912.7	30,884.8	30,182.0	30,778.7	30,672.0
Frozen Processed Food	7,032.9	7,144.9	6,883.0	7,039.6	7,119.9
Ice Cream	6,386.5	6,636.7	6,482.6	6,555.3	6,634.3
Meal Replacement	464.9	458.8	453.1	474.1	496.3
Noodles	14,447.9	14,407.1	14,536.3	14,642.3	14,752.6
Oils and Fats	3,792.1	3,650.3	3,961.7	4,140.6	4,296.6
Pasta	1,055.5	1,029.8	1,037.5	1,044.3	1,054.3
Ready Meals	18,521.4	18,861.2	19,551.0	19,377.1	19,926.9
Sauces, Dressings and Condiments	21,847.1	21,705.3	21,375.6	21,600.5	21,827.2
Snack Bars	651.9	645.6	633.2	647.6	661.1
Soup	2,392.2	2,386.1	2,395.1	2,416.1	2,448.0
Spreads	1,086.0	1,096.6	1,050.2	1,039.7	1,035.5
Sweet and Savoury Snacks	13,601.5	13,732.2	13,913.8	14,066.8	14,238.2

Source: *Euromonitor, 2012.* ***Note:*** *The Packaged Food totals as listed here are lower than the actual calculated totals, as some sub-categories are classified under more than one category.*

PROCESSED AND PACKAGED FOOD (continued)

Japan is known for its fast-paced lifestyle and reliance on convenience products. More women working outside of the home (women represent 40% of the labour force), a rising number of single-person households, and a growing variety of convenient product offerings at lower prices, have all contributed to the popularity of convenience food. As a result, there is increasing competition among manufacturers in the processed, frozen, packaged and ready-made sectors to address the needs of this market. Convenience in terms of limiting or assisting with household meal preparation, portioned sizes, and unique storage attributes will drive the purchase behaviour of Japanese consumers.

Ready-made meals and home meal replacements are proving increasingly popular and price-competitive, as supermarkets see more consumption by office workers on lunch breaks, as well as at home. The number of freezers owned in Japan is expected to grow, as consumers move away from the traditional method of purchasing fresh foods daily, and toward bulk shopping trips to supermarkets or hypermarkets, for pre-cooked, chilled and frozen foods. With most Japanese living in urban areas, supermarkets are able to meet Japanese consumers' growing demand for a wide variety of products.

Currently, consumers visit a variety of food outlets in order to purchase the highest quality food products. However, increased price awareness will drive demand for processed and frozen foods, as consumers are willing to sacrifice freshness to save money.

The 2011 Tohoku earthquake and tsunami affected the quality, distribution and production of local food. Concerns about food safety in the aftermath of this disaster also contributed to a growing demand for safe and high quality food and, for this reason, products with high quality and safety standards will be preferred in the Japanese market.

Source: *Mintel, 2012.*

MARKETING ETHNIC FOODS IN JAPAN

When looking to enter a new market or penetrate an existing one, connecting product attributes to the attitudes and values of consumers is an essential element in designing a sound marketing strategy. Understanding the drivers that lead Japanese consumers to experiment and purchase ethnic products is critical.

Generally, Japanese consumers, both young and old, place a high value on new experiences and are keen to experiment with unfamiliar foods. In Japan, increased awareness of foreign cuisine through the media, study, and travel, is resulting in greater demand for foreign restaurants and ingredients in the marketplace. Currently, Korean, Chinese, and Italian foods are particularly popular. In addition, there is an extensive selection of food and cooking-themed television programs and manga (Japanese comics) that encourage Japanese viewers to try ethnic foods. Japanese consumers are likely to follow new food trends, if highlighted by television shows.

Flavours and Innovation

Source: *Mintel, 2012.*

Salty flavours continue to be preferred by Japanese consumers, despite warnings from the Japanese Ministry of Health to reduce their daily consumption. The Ministry has launched a campaign to raise awareness of the risks of the over-consumption of salt. Japanese consumers are now seeking healthier options such as low-salt or lightly salted products. Flavours that can replace or simulate the taste of salt, such as vinegar and spices, are also becoming more popular (World Action on Salt).

The most preferred and traditional flavours are soy sauce, curry, and sesame. Cheese is also popular, and a variety of new cheese flavours are being introduced into the market. Products previously available only in "cheese" flavour are now being replaced by specific cheese varieties, such as Camembert, Parmesan or cheddar, demonstrating the increasingly discerning palates of Japanese consumers.

MARKETING ETHNIC FOODS IN JAPAN (continued)

As Japanese consumers are increasingly exposed to various foods and flavours from around the world, new Western products are becoming popular. To facilitate the introduction of unfamiliar flavours or products, a new trend of blending products to make them more agreeable to the Japanese palate is beginning to emerge. This includes snacks with flavours inspired by popular ethnic dishes. For example, Japan Frito-Lay recently collaborated with Pizza-la, a major pizza delivery chain, to launch Doritos with Pizza-la's fresh basil-Italian flavour. This trend of incorporating flavours has become increasingly popular and encourages Japanese consumers to try new products. Limited edition products are also popular in Japan, facilitating the introduction of new tastes, while providing a feeling of exclusivity and uniqueness.

Innovative products that blend two ethnic products into one distinct product are common in Japan. For example: Italian pasta sauces that incorporate an Indian element, such as curry tomato sauce; microwaveable Chinese siu mai dumplings with a pizza filling; Mexican taco snacks in Italian tomato flavour; and a combination of chowder soup and pasta.

Source: *Mintel, 2012.*

Snacks

According to Mintel, from January 2007 to January 2012, 3,265 new snack products were introduced into the Japanese market. The most popular categories were potato and corn-based snacks. Company Calbee Foods produced the most potato chip products, followed by Koikeya and Tohato. The company that produced the most corn-based snacks was PepsiCo, followed by Tohato.

Sweet and savoury snacks totalled US$13.9 billion in sales in 2011, and represented 6% of total packaged food retail value. The most popular flavours among savoury snacks continue to be light salt, consommé, and seaweed (Euromonitor). There has been an increase in preference for spicy flavours, such as chilli pepper, black pepper, horseradish, and curry.

Chips/crisps accounted for 27% of flavour ingredient volumes in the sweet and savoury snacks sector. Calbee Foods and Koikeya dominate the sector. As with other categories, popular flavours for sweet and savoury snacks in Japan include salt, consommé, and seaweed. Spicy flavours are gaining ground, with horseradish and chilli pepper as favourites. The trend of combining flavours is present in this category as well. Combinations, such as salt/caramel and salt/chocolate, have been popular amongst consumers.

Snacks introduced by Sub-Category between January 2007 - January 2012

Potato Snacks	37%
Corn-Based Snacks	22%
Hors d'oeuvres/Canapes	11%
Wheat & Other Grain-Based Snacks	10%
Snack/Cereal/Energy Bars	7%
Rice Snacks	5%
Meat Snacks	2%
Other Snacks	2%
Vegetable Snacks	2%
Popcorn	2%

Source: *Mintel, 2011.*

Source: *Mintel ,2012.*

MARKETING ETHNIC FOODS IN JAPAN (continued)

Claims

Safe and High Quality Ingredients

Japanese consumers desire high quality, nutritious, tasty, and safe food at a reasonable price. Product freshness and origin are very important factors that influence purchase decisions. Japanese consumers are skeptical about food safety, particularly older consumers who have a low level of trust and growing concerns about *Anzen* (safety) and *Anshin* (peace of mind) due to recent food scandals. Examples include the Snow Brand contaminated milk scandal, bovine spongiform encephalopathy (BSE) in beef, Chinese vegetables contaminated with dioxin, and the false labelling of beef. As a result, domestic products are particularly favoured in Japan. Manufacturers of frozen processed food often emphasize that their products are made from domestic ingredients.

Gourmet/Premium/Authentic Experiences

Influenced by Western media, young Japanese consumers are now pursuing Western lifestyles, which include consuming more red meat and dairy products. This has increased awareness of foreign cuisine and generated demand for foreign ingredients. Two consumer segments that Canadian exporters may wish to focus on for the best results are the ‘imported food fans’ and ‘food enthusiasts.’ These early adopters are extremely interested in imported foods, and are willing to pay a premium for them since there is a certain prestige associated with foreign delicacies. They are also more open to trying new recipes and cooking styles.

Source: *Mintel, 2012.*

Although luxury packaged food has declined somewhat in light of the weak global economy, gourmet foods and ingredients are still sought after, particularly for entertaining at home, following a renewed interest in cooking. There are, therefore, opportunities to sell high-value food products to Japanese consumers who wish to cook. Perceptions of Canada in Japan are positive, but awareness of Canadian products is low, compared to competitors. Canada faces competition from the United States, Australia, China, Southeast Asia, and the European Union.

Healthy and Organic Products

Japanese consumers are among the most health aware consumers globally, and are willing to work at actively maintaining and improving their health. However, lifestyle diseases are on the rise in Japan, due to the influence of the Western diet. Nevertheless, more and more Japanese are eating healthier in order to maintain slimmer figures. Low-calorie and non-fat products are targeted especially at women and dieters. With 22% of the population over the age of 65 and new compulsory health checks in place, the practice of eating foods with health benefits is going to rise dramatically.

Despite difficult economic times, Japanese consumers are buying into the benefits of higher-priced organic and fair-trade products. Notwithstanding the higher cost of organic foods, these products will likely gain popularity. Consumers will also seek foods with antioxidants, foods with a positive impact on blood sugar and cholesterol, dietary supplements, and functional foods and nutraceuticals. Functional foods are an established food category in the Japanese marketplace and have strong consumer acceptance. The Japanese functional foods market is the most developed in the world, illustrated by the cutting-edge innovations that continue to deliver more sophisticated and niche health benefits. Health-focused *zero-kei* (zero-type) products, those with zero calories, zero carbohydrates, or zero fat, are especially popular.

▶ MARKETING ETHNIC FOODS IN JAPAN (continued)

Packaging and Labelling

Japanese consumers do not just demand choice and variety in their selection of food, but also diversity in flavours and innovation in packaging. In-store presentation as well as the design and usability of packaging are very important, alongside convenience of preparation, consumption, and disposal. In fact, in-store marketing and packaging are the two most important sources of information about imported foods for Japanese consumers. Freshness, uniqueness and the "wow!" factor greatly influence the success of a product, with English-language labels seen as trendy. Therefore, the condition of a product on arrival reflects directly on the company and the quality of its products. Sensitive to the impact of the weak economy on Japanese spending power, manufacturers have also reduced package sizes to keep prices down. Generally, Japanese consumers prefer smaller portions than the North American standard.

Source: *Mintel, 2012.*

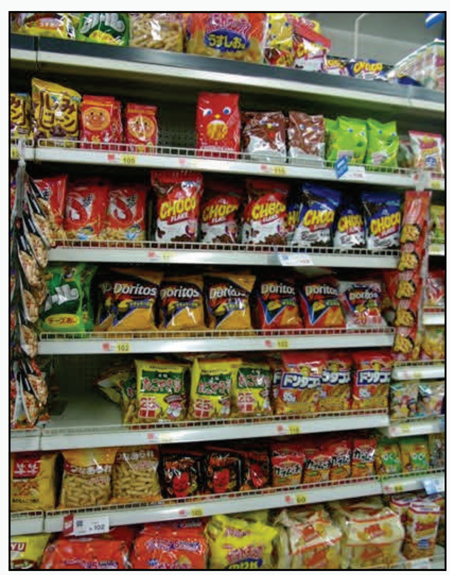
Japanese consumers are also very tech-savvy. Packages with QR codes that direct consumers to the manufacturer's website or a relevant site that provides information on the product (e.g., nutrition, origin, discounts, and suggested recipes), are also a great way to interact with shoppers. Since Japanese consumers are increasingly choosing private labels, adapting one's product to the packaging, labelling, portion size, and flavour to meet the needs of private label vendors could also be an opportunity to penetrate the Japanese market.

Price

Despite the economic downturn, consumers continue to eat out, but they have altered their habits to increase consumption at budget foodservice operators, such as fast food outlets, bakeries, and street vendors. In addition, Japanese consumers continue to eat imported food regularly. Avoidance of high-end restaurants will create an opportunity for high quality ingredients that can be used to prepare food at home. This will lead to a demand for fine meats, wines, foreign produce, and exotic ingredients from grocery stores, by consumers who cannot justify paying restaurant prices.

Coupon usage has also become more important to Japanese shoppers in their efforts to save money. Coupons may be a means of attracting awareness to one's product, providing it does not diminish the quality perception of the brand.

Source: *Planet Retail, 2012*



Source: *Planet Retail, 2012*

GROCERY RETAIL MARKET

Top Grocery Retailers in Japan, 2010

Company	Number of Outlets	Total Sales Area (m^2)	Average Sales Area (m^2)	Grocery Banner Sales (US$ millions)	Grocery Market Share (%)
AEON	7,890	12,278,994	1,556	55,451	14.5
Sevin & I	13,859	5,128,075	370	40,782	10.7
LAWSON	9,763	1,131,469	116	16,019	4.2
Uny	6,595	2,443,610	371	15,946	4.2
FamilyMart	8,248	911,960	111	14,757	3.9
Total	46,355	21,894,108	472	142,955	37.5

Source: *Planet Retail,2012.*

In 2010, grocery retail sales in Japan totaled US$407.3 billion (Euromonitor). Small traditional grocery stores remain the largest category in the retail food market, but there has been an increase in the number of superstores, supermarkets and convenience stores, despite the slower growth of the Japanese market.

Japan's retail sector remains relatively fragmented. As freshness remains one of the top priorities for Japanese consumers, they frequently shop four or five times a week, to guarantee the freshness of their products and produce. This gives high importance to small chains within the sector. It is expected that new consolidations by top players will allow them to gain market share in the future.

Hypermarkets
Hypermarkets have been one of the formats seeing growth in Japan's struggling retail sector. However, Japanese consumers still tend to favour a high frequency of shopping, often at their local store, and average basket sizes are relatively small.

Supermarkets
Supermarkets are increasing their role in the Japanese retail sector, as they try to expand their stores. Recent regulatory changes for stores over 500 square metres and lower land prices are helping supermarkets gain greater penetration in this sector. The largest supermarket player in the market is AEON, which mainly operates the MaxValu chain.

Discount Stores
Sales from discount stores remain relatively low compared to the rest of the sector. This is partially due to the fact that discount stores are not as widely available, nor as popular, in Japan. However, recent economic conditions are resulting in a slow increase in discount stores. It is important to note that most discount stores do not sell groceries and fresh produce. AEON and Lawson will continue to see growth in their market share of discount stores, as they recently launched their own discount store formats (A Colle, and Lawson Store 100, respectively).

Source: *Planet Retail, 2012.*

Convenience Stores
Convenience stores have remained the most important sector of the grocery retail channel. This sector has seen an increase in stores, sales area, and sales. Their format fits perfectly with the lifestyle of the Japanese consumer, who visits the local store four or five times a week to ensure produce freshness. Other factors, such as low car ownership rates and the small refrigerators that tend to be common in Japan, also contribute to shopping several times a week. The largest company in this sector is Seven-Eleven Japan, operator of 7-Eleven. FamilyMart, LAWSON and Uny are also significant participants.

GROCERY RETAIL MARKET (continued)

Cash and Carry and Wholesale Clubs

Cash and carry retailers are very recent players in Japan's retail market. Wholesalers already play a major role in the retail market, leaving little opportunity for cash and carry and other wholesale club-type companies. Metro Group only recently entered the market after researching it for six years, and Costco is the only warehouse club operator.

Sales in Japanese Grocery Retail by Category – US$ Billions

Format	2005	2006	2007	2008	2009	2010
Discounters	-	-	-	-	-	-
Food/Drink/Tobacco Specialists	70.6	64.9	59.9	55.0	49.6	45.5
Hypermarkets	0.6	0.6	0.5	0.5	0.4	0.4
Small Grocery Retailers	153.7	151.9	153.8	160.2	159.4	155.7
Convenience Stores	107.8	107.6	110.4	118.8	121.5	120.9
Forecourt Retailers	0.4	0.4	0.4	0.3	0.3	0.3
Independent Small Grocers	45.5	43.9	43.0	41.1	37.5	34.5
Supermarkets	205.9	209.9	206.8	202.7	193.6	183.3
Other Grocery Retailers	27.4	26.2	26.0	25.0	23.8	22.3
Grocery Retailers	458.2	453.5	447.2	443.5	426.8	407.3

***Source:** Euromonitor, 2012.* ***Exchange rate:** 1¥ = 0.0128 US$*

Value Growth (%) in Japanese Grocery Retail Sales by Format

Format	2009-2010	2005-2010 CAGR*	2005-2010 Total	2010-2015 CAGR*	2010-2015 Total
Discounters	-	-	-	-	-
Food/Drink/Tobacco Specialists	-8.3	-8.4	-35.5	-7.1	-30.9
Hypermarkets	-3.5	-7.8	-33.4	-2.6	-12.3
Small Grocery Retailers	-2.3	0.3	1.3	-0.4	-2.1
Convenience Stores	-0.5	2.3	12.2	0.8	4.0
Forecourt Retailers	0.0	-3.3	-15.3	0.7	3.3
Independent Small Grocers	-8.0	-5.4	-24.2	-5.2	-23.4
Supermarkets	-5.3	-2.3	-11.0	-3.5	-16.2
Other Grocery Retailers	-6.2	-4.1	-18.7	-5.8	-25.9
Grocery Retailers	-4.6	-2.3	-11.1	-2.7	-13.0

***Source:** Euromonitor, 2012.* ***CAGR** = compound annual growth rate*

***Source:** Planet Retail, 2012.*

***Source:** Planet Retail, 2012.*

CONSUMER FOODSERVICE

The consumer foodservice (CFS) industry in Japan saw sales of US$240.4 billion in 2010. It experienced a marginal decline in 2010, mostly due to the low performance of the Japanese economy. Price-sensitive consumers tried to spend as little as possible when eating out. Major chained players provided discounts and value-for-money items in order to increase transaction volume and maintain customers. It is expected that the industry's sales will continue to decline marginally, mostly due to the aging of the Japanese population. The decline in population is leading to smaller household sizes and older Japanese consumers will find it more difficult to commute to purchase food from the CFS industry.

The majority of CFS industry transactions take place within established outlets. Only street stalls and kiosks saw high rates of take-away food. However, delivery services are now being offered by full-service restaurants and convenience food vendors, to cater to the demands of both elderly and increasingly time-poor consumers.

Outlets in the Japanese Consumer Foodservice Industry by Type – 2010

Type	Independent	Chained
Cafés/Bars	279,038	33,872
100% Home Delivery/Takeaway	47,261	21,014
Full-Service Restaurants	265,067	24,974
Fast Food	2,970	62,102
Street Stalls/Kiosks	3,300	345
Pizza Consumer Foodservice	62	2,167
Self-Service Cafeterias	6,650	2,143
Consumer Foodservice	604,286	144,450

Source: *Euromonitor, 2012.*

Retail Value of the Japanese Consumer Foodservice Industry by Type US$ millions (Fixed 2010 Exchange Rates)

Type	2007	2008	2009	2010	2007-2010 CAGR*
Consumer Foodservice	263,537.5	260,040.4	244,877.6	240,458.3	-3.0
Chained	110,090.3	110,710.2	106,656.5	106,261.5	-1.2
Independent	153,447.2	149,330.2	138,221.0	134,196.7	-4.4
100% Home Delivery/Takeaway	29,923.2	29,118.4	26,920.5	26,122.3	-4.4
Cafés/Bars	65,787.8	64,154.2	59,399.5	58,026.4	-4.1
Full-Service Restaurants	125,284.6	123,302.4	114,967.8	111,968.4	-3.7
Fast Food	40,483.7	41,419.7	41,617.9	42,404.9	1.6
Self-Service Cafeterias	1,785.9	1,774.5	1,714.5	1,689.8	-1.8
Street Stalls/Kiosks	272.3	271.2	257.4	246.5	-3.3

Source: *Euromonitor, 2012.* ***CAGR** *= compound annual growth rate*

CONSUMER FOODSERVICE (continued)

Company Snapshots

All of the information and images in this section were sourced from Planet Retail, 2012.

SBARRO

Sbarro, an Italian fast food chain, has become extremely popular and quite profitable in Japan, with sales of US$1.8 million in 2010. The company offers Italian foods targeted to international customers and those seeking convenience, with outlets located in transport hubs or high-traffic areas. Due to its success, the company has plans to increase its presence in Japan. It has partnered with local company JCI Inc. with the goal of establishing 1,250 units over the next 20 years.

BASKIN ROBBINS

Baskin-Robbins is an ice cream parlour that offers 31 flavours. In its Japan stores, there are a range of Japanese flavours such as Azuki (sweet red beans) and green tea, with some outlets offering crêpes. The stores are located nationwide, but with a greater number in Tokyo and its metropolitan area. They are usually located in commercial buildings near train stations, but some are free-standing and built along motorways in suburban areas, and others established n the food courts of commercial facilities.

KENTUCKY FRIED CHICKEN (KFC)

KFC restaurants offer fried and non-fried chicken products sold in pieces. Other key items include pies, chicken strips, and various chicken sandwiches, as well as a variety of side dishes (including biscuits, mashed potatoes, coleslaw and corn), desserts and non-alcoholic beverages. In 2011, KFC registered total sales in Japan of US$1.9 billion. KFC Japan has over 1,500 stores located throughout the country.

EL TORITO

El Torito restaurants have offered authentic Mexican meals in Japan since 1988. There are currently nine outlets located in populous downtown and commercial areas in Osaka and Tokyo. The company reported sales of US$12.5 million in Japan for 2011.

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ISSN 1920-6615
AAFC No. **11748E**

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Agriculture and Agri-Food Canada
1341 Baseline Road, Tower 5, 4th floor
Ottawa, ON
Canada K1A 0C5
E-mail: infoservice@agr.gc.ca

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