



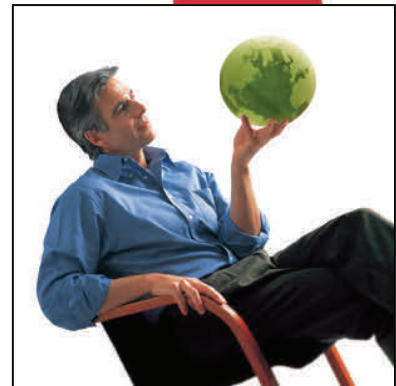
Agriculture and  
Agri-Food Canada

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International  
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MARKET INDICATOR REPORT | APRIL 2013

## Fruit and Vegetable Juices in Japan





### ▶ EXECUTIVE SUMMARY

Japanese consumers are becoming increasingly conscious of their own wellness, driven by government campaigns emphasizing one's own responsibility for health. The Japanese population is also aging as a whole, contributing to a burgeoning number of senior consumers who are actively seeking to educate themselves regarding health matters and nutrition.

Along with the trend toward even greater health-consciousness, many companies are finding that older demographics represent the majority of their clientele. In both instances, fruit and vegetable juice manufacturers are adapting their products accordingly, developing products that address the particular needs and concerns of this older, more health-conscious market.

In 2012, off-trade\* value sales of fruit and vegetable juices in Japan registered US\$10.4 billion. Despite this, per capita consumption of fruit and vegetable juices by volume is significantly lower in Japan than in many other countries.

In 2012, the category of juice drinks (beverages containing up to 24% juice) grew in off-trade volume sales over the previous year. However, the other fruit and vegetable juice categories declined or are forecast to see slowing growth. This is largely due to limited innovation in the sector as a whole, which has constrained the sector's ability to attract new consumer markets.

\***Off-trade** refers to product sales through retail formats, and does not include sales through foodservice establishments (referred to as **on-trade**).

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Source: Mintel, 2012



## ▶ CONSUMER DEMOGRAPHICS

With 30.6 million people aged 65 or older, a median age of 45.4 years, and an average life expectancy of 83 years, the senior demographic in Japan represents an important market in terms of size alone. The senior population in Japan has a significant financial impact. The majority of consumers over the age of 50 have substantial retirement savings and high disposable incomes. Together, these factors characterize a growing market of consumers that would be well-suited to targeted marketing.

Cutting-edge medical research and development are key factors in determining the longevity of the Japanese population. However, active lifestyles and healthy diets also play a significant role. Japanese consumers are very mindful of their health, and continue to demand products that are organic or have various nutritional claims, such as “low calorie” or “fibre/vitamin enriched.” Products also have to be increasingly innovative and inspiring in order to attract the interest of these consumers.

**Historic/Forecast Japan Consumer Segmentation by Age  
(Thousands of People)**

| Age Segment               | 2012     | 2016     | 2020     | % Growth<br>2012-2020 |
|---------------------------|----------|----------|----------|-----------------------|
| Babies/infants (aged 0-2) | 3,125.8  | 2,835.4  | 2,550.5  | -18.4                 |
| Kids (aged 3-8)           | 6,403.3  | 6,210.9  | 5,708.3  | -10.9                 |
| Tweens (aged 9-12)        | 4,607.9  | 4,273.1  | 4,190.0  | -9.1                  |
| Teens (aged 13-17)        | 5,975.8  | 5,782.7  | 5,386.6  | -9.9                  |
| Young adults (aged 18-29) | 15,775.0 | 14,983.2 | 14,600.7 | -7.4                  |
| Middle youth (aged 30-44) | 26,762.0 | 24,913.3 | 22,193.8 | -17.1                 |
| Mid-lifers (aged 45-59)   | 23,848.0 | 24,585.3 | 26,159.2 | 9.7                   |
| Late-lifers (aged 60+)    | 41,075.8 | 42,758.6 | 43,533.0 | 6.0                   |

Source: Euromonitor, 2013

## ▶ RETAIL SALES

In 2012, off-trade value sales of fruit and vegetable juice in Japan reached US\$10.4 billion. This represents an increase from the previous year, and value sales are expected to continue rising slowly over the forecast period of 2012 to 2017.

**Japanese Fruit and Vegetable Juice Market Sizes  
Historic/Forecast Retail Sales Value and Volume**

|   | 2008  | 2009  | 2010  | 2011  | 2012   | 2013   | 2014   | 2015   | 2016   | 2017   |
|---|-------|-------|-------|-------|--------|--------|--------|--------|--------|--------|
| Off-trade value (based on retail sale price in US\$ millions) | 8,209 | 8,271 | 9,021 | 9,970 | 10,443 | 10,587 | 10,685 | 10,779 | 10,787 | 10,770 |
| Off-trade volume (in millions of litres)                      | 2,374 | 2,159 | 2,271 | 2,331 | 2,439  | 2,466  | 2,458  | 2,442  | 2,418  | 2,388  |

Source: Euromonitor, 2013



## ▶ RETAIL SALES (continued)

Sales of fruit and vegetable juice are divided into three distinct and competing categories: 100% juice, juice nectars (25-99% juice), and juice drinks (up to 24% juice). By category, 100% juice holds the largest volume share (61%) of the market, followed by juice drinks at 29%. Nectars make up a much smaller proportion of the juice market as a whole, with 10%.

Products within the 100% juice category are generally considered to be more adult oriented. Juices classified as “not from concentrate” continue to be a traditional preference in Japan, with many small producers manufacturing their own products for local consumption. Japan produces a very large harvest of a variety of popular juice fruits, such as tangerines and Satsuma oranges. While juices under the health and wellness banner are growing (such as functional juices and organic juices), they are not yet well established in Japan.

While sales of fruit and vegetable juice per capita are expected to remain stable in Japan, consumption remains relatively low. The breadth of the market, as well as the traditional popularity of green tea and alcoholic beverages in Japan, is a major factor in the low per capita sales. This represents an opportunity for juice manufacturers to increase individual sales in Japan by introducing innovative and functional products that keep consumers’ interest.

**Japanese Fruit and Vegetable Juice Market Sizes by Category**  
**Historic/Forecast Off-Trade Retail Sales Volume in Millions of Litres**

| Category                       | 2008  | 2009  | 2010  | 2011  | 2012  | 2013  | 2014  | 2015  | 2016  | 2017  |
|--------------------------------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|
| 100% juice                     | 1,448 | 1,345 | 1,389 | 1,385 | 1,476 | 1,501 | 1,494 | 1,480 | 1,458 | 1,430 |
| Nectars (25-99% juice)         | 295   | 287   | 290   | 256   | 248   | 243   | 239   | 236   | 233   | 231   |
| Juice drinks (up to 24% juice) | 631   | 527   | 592   | 689   | 716   | 723   | 726   | 727   | 727   | 727   |

Source: Euromonitor, 2013

## ▶ HEALTH AND WELLNESS

The retail value of the health and wellness fruit and vegetable juice market represents approximately 58% of the total fruit and vegetable juice market in Japan. Naturally healthy and fortified/functional are the most popular health and wellness juices, with organic juices seeing steady value growth. The Japanese government actively promotes making healthy food choices through an anti-obesity law and a robust functional food classification agency. The country’s national health-consciousness has contributed to rising demand for juices that are perceived to retain the nutritional value of fresh fruits and vegetables, such as those within the organic juice category. Japanese consumers are looking for products offering nutritional value and/or functional benefits that are also convenient and tasty.



Source: Mintel, 2012

**Japanese Health and Wellness Fruit and Vegetable Juice Market Sizes**  
**Historic/Forecast Retail Sales Value in US\$ Millions**

| Category                   | 2006  | 2007  | 2008  | 2009  | 2010  | 2011  | 2012  | 2013  | 2014  | 2015  |
|----------------------------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|
| Naturally healthy juice    | 5,604 | 6,276 | 6,108 | 5,748 | 5,470 | 5,330 | 5,218 | 5,159 | 5,134 | 5,132 |
| Fortified/functional juice | 285   | 308   | 314   | 321   | 328   | 337   | 349   | 364   | 381   | 400   |
| Organic juice              | 50    | 55    | 56    | 57    | 59    | 63    | 67    | 71    | 77    | 83    |

Source: Euromonitor, 2012



**▶ MARKET SHARES BY BRAND AND COMPANY**

Yasai Seikatsu is the market leader in the Japanese fruit and vegetable juice market, holding a 7.5% share in 2012. The fruit juice market is quite diversified with many small producers and private label producers.

**Top 15 Market Shares of Fruit and Vegetable Juice in Japan by Brand and Company  
Retail Value % Breakdown**

| Brand                     | Company Name               | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 |
|---------------------------|----------------------------|------|------|------|------|------|------|
| Yasai Seikatsu            | Kagome Co Ltd              | 6.1  | 7.0  | 7.5  | 7.3  | 7.6  | 7.5  |
| Minute Maid               | Coca-Cola Co, The          | 5.6  | 6.3  | 6.9  | 6.4  | 5.9  | 5.7  |
| Natchan                   | Suntory Holdings Ltd       | 4.6  | 4.9  | 5.1  | 5.7  | 5.4  | 5.2  |
| Qoo                       | Coca-Cola Co, The          | 5.7  | 6.2  | 6.4  | 5.3  | 4.8  | 4.7  |
| Bireley's                 | Asahi Breweries Ltd        | -    | -    | -    | -    | 4.3  | 4.3  |
| Ichinichi bun no Yasai    | Ito En Ltd                 | 1.9  | 1.9  | 2.1  | 2.7  | 3.5  | 4.0  |
| Yasai Ichinichi Koreippon | Kagome Co Ltd              | 1.8  | 2.0  | 2.4  | 2.8  | 3.4  | 3.9  |
| Tropicana                 | PepsiCo Inc                | 4.2  | 4.2  | 4.2  | 4.1  | 3.9  | 3.8  |
| Jujitsu Yasai             | Ito En Ltd                 | 3.4  | 3.7  | 4.0  | 3.8  | 3.8  | 3.8  |
| Nichirei                  | Suntory Holdings Ltd       | -    | -    | -    | 2.4  | 3.5  | 3.4  |
| Dydo                      | Dydo Drinco Inc            | 3.4  | 3.3  | 3.0  | 3.1  | 3.1  | 2.6  |
| Nokyo                     | Megamilk Snow Brand Co Ltd | -    | -    | -    | -    | 2.3  | 2.4  |
| POM                       | Ehime Inryou Co Ltd        | 2.2  | 2.4  | 2.6  | 2.6  | 2.5  | 2.4  |
| Koiwai                    | Kirin Holdings Co          | 2.6  | 2.8  | 2.9  | 2.8  | 2.2  | 2.3  |
| Vitamin Fruit             | Ito En Ltd                 | 1.6  | 1.8  | 2.1  | 2.0  | 1.9  | 1.8  |

Source: Euromonitor, 2013



Source: Datamonitor, 2011.



**▶ NEW PRODUCTS**

According to the Mintel Global New Products Database, 260 new fruit and vegetable juice products entered the Japanese market from January 2012 to December 2012. Of these 260 new products, the majority were new varieties or range extensions (171), followed by completely new introductions (32), re-launches (27), products with new packaging (25), and new formulations (5). The most popular package types were cartons (115) and bottles (102). Other packaging types included: Tubs (26), cans (10), flexible stand-up pouches (5), cases (1) and flexible sachets (1).

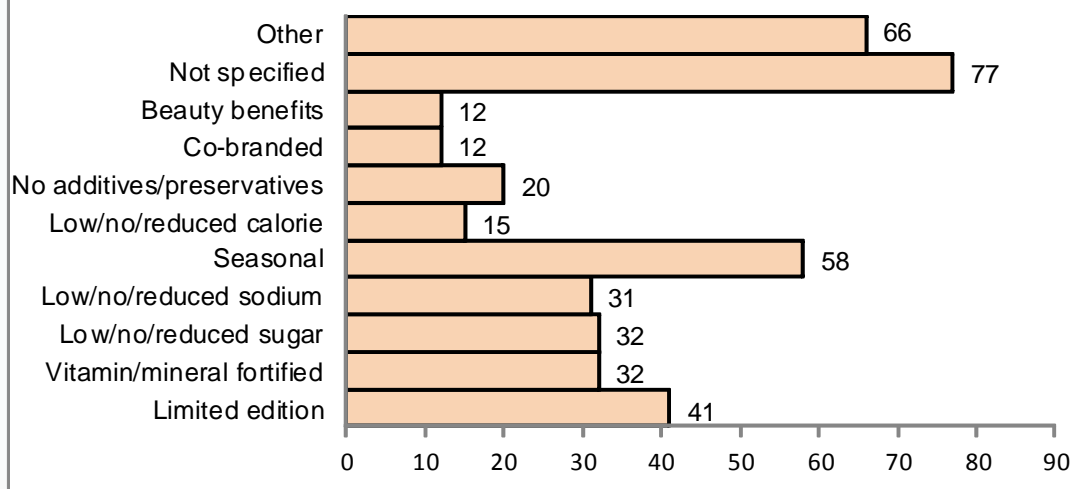
Companies LB, Kirin Beverage, and Asahi Soft Drinks introduced the largest number of new product varieties during this period with 29, 24, and 20 launches, respectively. Brand-wise, Asahi Bireley's, line had the most new launches (12), followed by LB (9) and Kagome Yasai Seikatsu 100 (8).

**Top 10 Flavours for New Fruit and Vegetable Juice Product Launches in Japan (2012)**

| Flavour                   | Number of Product Launches |
|---------------------------|----------------------------|
| Pineapple                 | 13                         |
| Vegetable                 | 11                         |
| Grapefruit                | 11                         |
| Grape                     | 11                         |
| Apple                     | 11                         |
| Tomato                    | 10                         |
| Orange                    | 10                         |
| Vegetable and fruit       | 9                          |
| Peach                     | 9                          |
| Citrus                    | 8                          |
| <b>Total new products</b> | <b>260</b>                 |

Source: Mintel, 2013

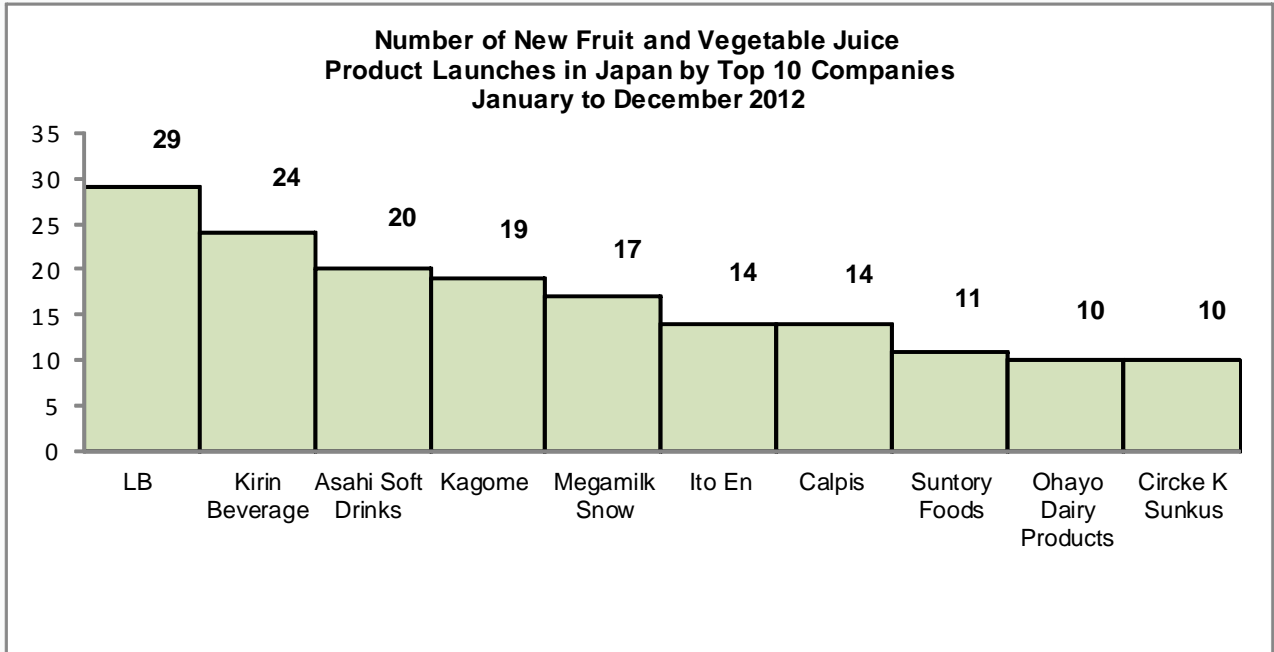
**New Fruit and Vegetable Juice Product Launches in Japan by Top Claims (January to December 2012)**



Source: Mintel, 2013



▶ **NEW PRODUCTS (continued)**



Source: Mintel, 2013

▶ **NEW PRODUCT EXAMPLES**

Examples of new juice products launched in Japan, taken from the Mintel Global New Products Database:



**Super Concentrated Vegetable Jelly**

**Company:** Kagome  
**Brand:** Kagome Yasai Ichinichi Kore Ippon  
**Country:** Japan  
**Price:** US\$2.26  
**Size:** 100 g

**Peach Drink**

**Company:** LB  
**Brand:** Asahi Bireley's Chilled Style  
**Country:** Japan  
**Price:** US\$1.61  
**Size:** 1 L



**Pineapple and Mango Tropical Mix Juice**

**Company:** Circle K Sunkus  
**Brand:** Cherie Dolce Cafe  
**Country:** Japan  
**Price:** US\$2.43  
**Size:** 200 g

**Yuzu & Satsuma Juice Drink**

**Company:** Ito En  
**Brand:** Ito En Wa No Kajitsu  
**Country:** Japan  
**Price:** US\$1.50  
**Size:** 240 g





▶ **TRADE DATA**

**Japanese Import Statistics  
Fruit and Vegetable Juice Imports from the World, by Commodity**

| Commodity | Description   | C\$         |             |             | % Change<br>2010-11 |
|-----------|---|-------------|-------------|-------------|---------------------|
|           |   | 2009        | 2010        | 2011        |                     |
| 2009      | Total fruit/vegetable juices, not fortified with vitamins/minerals, unfermented, whether or not sweetened, not containing spirits | 696,863,169 | 630,447,872 | 870,309,407 | 38.05               |
| 200980    | Juice of any single fruit/vegetable, whether or not sweetened, unfermented  | 166,213,733 | 134,827,903 | 180,563,850 | 33.92               |
| 200979    | Apple juice, not fortified with vitamins, unfermented   | 130,376,085 | 99,345,945  | 154,205,450 | 55.22               |
| 200919    | Orange juice, other than frozen, whether or not sweetened   | 53,547,559  | 61,125,064  | 118,091,343 | 93.2                |
| 200911    | Orange juice, frozen, whether or not sweetened  | 88,788,580  | 85,882,152  | 117,825,661 | 37.19               |
| 200969    | Grape juice, not fortified with vitamins/minerals   | 103,921,798 | 102,245,964 | 114,021,654 | 11.52               |
| 200939    | Juice of other single citrus fruit, not fortified with vitamins/minerals  | 45,990,894  | 46,385,606  | 52,383,029  | 12.93               |
| 200929    | Grapefruit juice, not fortified with vitamins/minerals  | 37,200,641  | 38,483,336  | 50,895,392  | 32.25               |
| 200990    | Mixtures of fruit and/or vegetable juices   | 17,994,692  | 16,286,123  | 27,194,876  | 66.98               |
| 200949    | Pineapple juice, not fortified, unfermented   | 20,593,106  | 19,601,474  | 23,538,376  | 20.08               |
| 200931    | Juice of one citrus fruit, Brix Value <=20, not fortified with vitamins/minerals  | 13,041,621  | 9,841,345   | 11,992,036  | 21.85               |

Source: Global Trade Atlas, 2012





▶ **TRADE DATA (continued)**

**Japanese Import Statistics  
Fruit and Vegetable Juice Imports by Major Supplier**

| Partner Country | C\$         |             |             | % Share |        |        | % Change<br>2010-11 |
|-----------------|-------------|-------------|-------------|---------|--------|--------|---------------------|
|                 | 2009        | 2010        | 2011        | 2009    | 2010   | 2011   |                     |
| World           | 696,863,169 | 630,447,872 | 870,309,407 | 100.00  | 100.00 | 100.00 | 38.05               |
| Brazil          | 128,167,531 | 133,184,367 | 210,572,663 | 18.39   | 21.13  | 24.20  | 58.11               |
| United States   | 121,532,181 | 116,401,136 | 138,545,845 | 17.44   | 18.46  | 15.92  | 19.02               |
| China           | 92,972,647  | 74,558,441  | 117,770,531 | 13.34   | 11.83  | 13.53  | 57.96               |
| Israel          | 34,533,465  | 34,912,221  | 60,897,997  | 4.96    | 5.54   | 7.00   | 74.43               |
| Argentina       | 45,561,482  | 43,607,021  | 46,391,469  | 6.54    | 6.92   | 5.33   | 6.39                |
| Australia       | 36,361,349  | 26,775,589  | 40,562,377  | 5.22    | 4.25   | 4.66   | 51.49               |
| Italy           | 32,302,570  | 28,607,183  | 36,182,358  | 4.64    | 4.54   | 4.16   | 26.48               |
| Chile           | 35,517,657  | 27,873,196  | 30,831,454  | 5.10    | 4.42   | 3.54   | 10.61               |
| New Zealand     | 19,886,671  | 17,558,659  | 26,511,353  | 2.85    | 2.79   | 3.05   | 50.99               |
| South Africa    | 21,745,237  | 18,662,379  | 22,783,362  | 3.12    | 2.96   | 2.62   | 22.08               |

Source: Global Trade Atlas, 2012

▶ **KEY SOURCES**

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### **Fruit and Vegetable Juices in Japan**

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