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MARKET ACCESS SECRETARIAT
Global Analysis Report

Packaged Food Sales
in Japan

May 2015

EXECUTIVE SUMMARY

A changing internal and external economic environment has challenged Japan's economy in recent years, especially since exports have been Japan's key source of economic strength. However, as the global economy faces challenges from dismal growth, demand for Japanese exports is either declining or stagnant at best. In addition, an aging population is shifting the country's economic structure. Finally, the Great Eastern Japan Earthquake, which occurred in 2011, also contributed to economic contraction. These dynamics led to a decline in consumer confidence and reduced unnecessary spending (Euromonitor International, 2015). However, some markets, including packaged food, were less affected than anticipated.

The Japanese packaged food market has traditionally been characterized as complex and challenging to enter, and at the same time, rewarding and profitable when these challenges can be overcome. Increasing emphasis on organic, convenient, quick-to-prepare, ready-to-eat, and value-priced foods, have opened some opportunities for exporters in this market. As well, consumers are increasingly interested in western-style products, which may further benefit Canadian manufacturers.

On the demographic front, Japanese consumers are some of the oldest in the world. This group of elders is very much interested in new and innovative food products, specifically those that target health matters, come in small portions, have easy to open packaging and are easy to chew.

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PACKAGED FOOD MARKET CHARACTERISTICS

Japan is the world's third-largest economy after the United States and China; it is also an important market for many international packaged food manufacturers. In addition, Japan is the world's fourth-largest food importer, relying on other countries for over 60% of its food.

While traditional menus and tastes still generally guide average Japanese consumption habits, Western and other Asian ethnic cuisines are making headway in the market. However, Japan's high-end food and beverage market continues to face important challenges, resulting from an aging population and a lasting anemic economic growth. However, this has accentuated the trend toward functional, healthy, nutritious and value-for-money food items.

Despite all of this, Japanese consumers are willing to accept high prices for quality, safety and convenience. To this end, major supermarket chains in Japan are introducing wider private label offerings in addition to sourcing new and innovative food products.

Euromonitor predicts that the Japanese population will decline in the upcoming years due to a low birth rate; consequently, the Japanese food market may have to shift to accommodate an ever-expanding older and wealthy population. The opportunities for high-quality and high-value foods that meet the demand of this market will only increase.

JAPANESE CONSUMER CHARACTERISTICS

Food retailers and manufacturers have invested a great deal to develop several product lines that accommodate Japan's younger customers who are always on the go. They have also created ready-to-eat meals targeting working mothers, and now provide services for the fast growing elderly population, such as delivery. Euromonitor describes average Japanese consumers as people who:

- Have small families and homes with minimal storage space, thus, large packages are impractical.
- "Eat with their eyes" and often view food as art. All food products have to be of aesthetic appearance, on the shelf, in the package, and on the table.
- Are highly concerned about food safety and traceability.
- Place great importance on quality.
- Appreciate taste and all of its subtleties (and are willing to pay for it).
- Are well-educated and knowledgeable about food and its many variations.
- Are highly brand-conscious.
- Care a great deal about seasonal foods and freshness.
- Are increasingly health-conscious, all-across the generations spectrum.
- Are sophisticated and highly demanding with uncompromising quality standards, who expect high-value and consistency even from inexpensive products.
- Are willing to pay a premium for innovative and creative products.

According to Euromonitor, Japan's baby boom generation (people born around 1947) is now at the age of retirement, and account for the majority of consumption in Japan. With roughly 32 million citizens, and the fastest growing elderly population (over 65), Japan has one of the oldest population in the world. Furthermore, recent Euromonitor demographic reports claim this demographic group represents 26% of the entire Japanese population (2014). By 2020, it is estimated to increase to 29% and then to 36% by the year 2040. In addition, the total population is expected to decline from 127 million in 2014 to 105 million in 2040, therefore affecting the entire Japan economy including the packaged food industry. It is expected that functional foods will be the largest beneficiary of this demographic change.

The demographic changes in Japanese society continue to drive growth in meal replacements, ready-meal solutions and canned/preserved foods. This trend will continue for the years to come, as there has been growth in the number of consumers who prefer to pay more to save time, rather than cook from scratch. Furthermore, there has also been growth in the number of single females and males who do not get married. These consumers particularly value the convenience of ready meals, as they often need to work long hours and have little time to prepare meals themselves.

RETAIL SALES

Euromonitor predicts that sales of packaged food will continue to grow in the Japanese market, albeit marginally, as consumers continue to seek out convenient meal solutions amidst demographic and lifestyles changes. In addition, manufacturers will continue to introduce value-added products in less developed categories, which will contribute to sustaining the declines in more mature staple categories.

In sales terms, the most important packaged food categories within Japan are chilled processed foods (led by chilled ready meals and chilled meats), bakery products (led by bakery goods), and dried processed foods (led by rice and instant noodles).

As a Westernization of eating habits spreads amongst consumers, staples like rice continue to decline in sales, negatively affecting the biggest category in dried processed food. On the other hand, ready meals, as well as portable, innovative and convenient foods, are making headway.

Retail Sales of Packaged Food in Japan, Year on Year Growth (%)
Historic Retail Value in US$ Millions Current Prices – Fixed 2014 Exchange Rates

Categories	2009-10	2010-11	2011-12	2012-13	2013-14
Total Packaged Food	**-1.20**	**-1.10**	**0.10**	**0.30**	**1.70**
Meal replacement	0.00	3.90	4.00	2.90	5.10
Ready meals	1.80	3.00	2.50	2.60	3.60
Canned/preserved food	-1.50	-0.70	3.90	1.80	3.40
Ice cream	3.80	-0.30	2.00	3.50	3.10
Soup	-0.30	2.00	3.10	1.00	3.00
Dairy	-0.70	1.70	2.80	2.00	2.80
Chilled processed food	-0.90	-3.20	-1.10	0.60	2.50
Snack bars	0.70	-6.80	0.30	1.40	2.50
Frozen processed food	1.60	1.30	2.00	3.10	2.10
Oils and fats	-4.90	0.00	1.50	1.20	1.90
Noodles	-0.60	3.30	-0.20	1.20	1.80
Sauces, dressings and condiments	-1.70	-3.50	-2.70	0.60	1.60
Bakery	-1.90	0.80	-0.40	-1.30	1.20
Confectionery	-1.60	-0.50	-1.50	-1.10	0.40
Pasta	-2.40	6.40	-0.30	-2.80	0.00
Dried processed food	-3.60	-0.80	2.10	-0.60	-0.10
Spreads	0.70	0.40	-0.10	-3.10	-0.20
Sweet and savoury snacks	1.00	0.30	-0.90	-1.50	-0.60
Baby food	-3.20	-4.30	-5.90	-3.10	-1.80

Source: *Euromonitor International, 2015*

Retail Sales of Packaged Food in Japan, by Segment – Historic Retail Value in US$ Millions and Period Growth (%) – Current Prices – Fixed 2014 Exchange Rates

Categories	2010	2011	2012	2013	2014	% CAGR 2010-14
Total Packaged Food	**184,673.2**	**182,572.3**	**182,679.0**	**183,256.3**	**186,294.0**	0.00
Chilled processed food	53,705.9	51,996.9	51,428.1	51,750.6	53,058.3	-0.01
Bakery	26,267.5	26,476.2	26,383.0	26,026.9	26,350.4	-0.01
Dried processed food	22,946.8	22,774.7	23,262.7	23,134.2	23,100.1	-0.01
Dairy	19,670.0	20,005.4	20,561.0	20,962.3	21,547.1	0.01
Sauces, dressings and condiments	20,139.7	19,441.0	18,918.6	19,027.1	19,324.2	-0.01
Ready meals	15,117.5	15,573.6	15,956.2	16,369.9	16,967.3	0.02
Sweet and savoury snacks	11,118.5	11,147.3	11,043.9	10,873.0	10,806.4	0.00
Noodles	9,747.2	10,071.1	10,055.5	10,172.1	10,358.8	0.01
Confectionery	8,007.3	7,970.6	7,852.8	7,767.4	7,795.0	-0.01
Canned/preserved food	6,422.9	6,375.2	6,626.2	6,742.1	6,968.5	0.01
Frozen processed food	5,544.8	5,614.6	5,727.8	5,907.3	6,028.9	0.02
Ice cream	5,349.9	5,333.2	5,440.9	5,629.6	5,804.0	0.02
Oils and fats	2,298.2	2,298.8	2,332.2	2,360.0	2,403.8	0.00
Soup	1,906.5	1,945.2	2,004.9	2,025.1	2,084.9	0.01
Baby food	1,109.3	1,062.0	999.7	968.8	951.6	-0.03
Pasta	825.4	878.5	875.9	851.5	851.7	0.00
Spreads	667.3	669.8	668.9	648.1	647.0	0.00
Snack bars	638.2	595.1	596.9	605.2	620.3	-0.01
Meal replacement	531.0	551.6	573.4	590.1	619.9	0.02

Retail Sales of Packaged Food in Japan, by Segment – Forecasted Retail Value in US$ Millions and Period Growth (%) – Current Prices – Fixed 2014 Exchange Rates

Categories	2015	2016	2017	2018	2019	% CAGR 2015-19
Total Packaged Food	**191,016.0**	**193,982.6**	**195,702.3**	**197,362.7**	**199,063.5**	**1.04**
Chilled processed food	54,731.9	55,679.0	56,117.5	56,580.4	57,053.8	1.04
Bakery	26,892.5	27,237.4	27,590.9	27,925.9	28,261.6	1.25
Dried processed food	23,409.1	23,543.5	23,476.0	23,459.6	23,494.8	0.09
Dairy	22,260.0	22,811.4	23,225.9	23,581.7	23,924.4	1.82
Sauces, dressings and condiments	19,807.6	20,120.9	20,210.7	20,268.1	20,300.0	0.62
Ready meals	17,582.8	18,058.1	18,325.9	18,572.1	18,798.5	1.69
Sweet and savoury snacks	10,921.7	10,976.5	11,027.4	11,086.2	11,156.9	0.53
Noodles	10,644.2	10,818.9	10,887.6	10,938.4	10,968.3	0.75
Confectionery	7,903.5	7,932.5	7,965.6	7,995.1	8,049.7	0.46
Canned/preserved food	7,228.1	7,442.3	7,557.4	7,662.1	7,758.3	1.79
Frozen processed food	6,266.8	6,443.3	6,547.4	6,632.1	6,699.9	1.68
Ice cream	5,985.6	6,114.9	6,230.1	6,339.8	6,448.4	1.88
Oils and fats	2,431.8	2,453.9	2,478.4	2,504.8	2,532.5	1.02
Soup	2,166.1	2,225.4	2,265.6	2,304.3	2,341.4	1.96
Baby food	951.9	935.9	921.2	908.9	895.9	-1.50
Pasta	859.8	859.6	857.3	856.3	856.4	-0.10
Spreads	652.1	656.8	662.6	668.5	676.0	0.90
Snack bars	634.9	644.0	651.7	659.0	666.8	1.23
Meal replacement	663.3	709.9	757.6	807.3	860.3	6.72

***Source for both:** Euromonitor International, 2015* ***Note:** CAGR is the Compound Annual Growth Rate.*

COMPETITION

Euromonitor identified the top four packaged food companies as Meiji Holdings Co Ltd, JA Group (Japan Agricultural Cooperatives), Yamazaki Baking Co Ltd, and Nissin Foods Holdings Co Ltd, which account for only 11% of the market combined. This shows that Japan has a fragmented packaged food sector. All four companies have maintained the same share over the past four years.

Meiji Holdings Co Ltd focusses its packaged food production on biscuits, ice cream, baby food and dairy products, but over the last year, they have strengthened their convalescence products (food substitutes use to replace meals when a person is experiencing health problems) in light of the aging population. JA Group's business activities revolve around agricultural production, but their most important packaged food product is rice. Yamazaki is an independent company, which provides reasonably priced high-quality freshly baked goods. Its packaged food business is made up of confectionery, jams and preserves, and desserts. Finally, Nissin Foods Holdings Co Ltd, in the medium term, is focussing mainly on its instant noodles production in hopes of increasing its value share within this sub category. The company supplies retailers and consumer foodservice in Japan entirely through domestic production.

Top 10 Packaged Food Companies in Japan (by Global Owner)
% Breakdown Based on Retail Value Sales

Companies	2011	2012	2013	2014
Meiji Holdings Co Ltd	3.10	3.10	3.20	3.30
JA Group (Japan Agricultural Cooperatives)	3.00	3.10	3.10	3.10
Yamazaki Baking Co Ltd	2.50	2.50	2.50	2.50
Nissin Foods Holdings Co Ltd	1.80	1.80	1.90	1.90
Lotte Group	1.50	1.50	1.50	1.50
Megmilk Snow Brand Co Ltd	1.40	1.40	1.40	1.40
Morinaga Milk Industry Co Ltd	1.40	1.50	1.40	1.40
Ezaki Glico Co Ltd	1.20	1.20	1.30	1.30
Yakult Honsha Co Ltd	1.10	1.10	1.10	1.10
Kewpie Corp	1.00	1.00	1.10	1.10

Source: *Euromonitor international, 2015*

KEY MARKET SEGMENTS 2010-2014

The information contained in this section has been sourced from Euromonitor International (2015).

Chilled Processed Food

In 2014, sales in this sector were anticipated to increase from US$51.8 billion to US$53.1 billion, while sales volume stayed at 3.5 million tonnes.

Main Sectors

- Sales of chilled fish and seafood have increased from US$26.6 billion in 2013 to US$26.7 billion in 2014 while the volumes dropped slightly.
- Sales of chilled ready meals have increased from US$1.31 billion in 2013 to US$1.36 billion to 2014, for a volume of 1.1 million tonnes.
- Volume sales of chilled processed meat increased to 537,100 tonnes in 2014 for an estimated value of US$950 million.

Main Companies and their Japanese Brands

- Generics retained the leading position in the chilled processed food segment with a 58.9% value share in 2014, followed by Marudai Food Co Ltd with 1.3%, and Prima Meat Packers Ltd with 1.1%.

Forecasts for 2015-2019

- The chilled processed food category is forecasted to post a CAGR of 1.04% in value terms to reach US$57.0 billion by 2019.
- Increases are also expected as a result of a weak Japanese yen, which may raise the unit price of chilled processed food, which is dependent on imported ingredients.

Volume Sales of Chilled Processed Food by Category in Thousand Tonnes: 2010-2014

Category	2010	2011	2012	2013	2014	% CAGR 2010-14
Total chilled fish/seafood	**1,499.0**	**1,418.7**	**1,366.5**	**1,341.9**	**1,321.4**	**-3.1**
Chilled processed fish/seafood	1,396.3	1,318.1	1,265.4	1,240.1	1,220.3	-3.3
Chilled coated fish/seafood	0.5	0.5	0.5	0.5	0.5	0.0
Chilled smoked fish/seafood	102.1	100.1	100.6	101.3	100.7	-0.3
Total chilled processed food	**3,631.0**	**3,556.8**	**3,527.8**	**3,516.2**	**3,508.7**	**-0.9**
Chilled noodles	333.2	329.8	327.2	317.4	311.0	-1.7
Chilled pizza	29.1	28.4	28.9	29.5	29.9	0.7
Chilled processed meat	533.6	520.2	525.4	531.7	537.1	0.2
Chilled ready meals	1,109.8	1,132.0	1,149.0	1,162.8	1,174.4	1.4
Chilled soup	21.5	21.8	22.9	23.5	23.8	2.6
Chilled/fresh pasta	2.4	2.4	2.3	2.4	2.4	0.0
Fresh cut fruits	83.8	84.5	85.3	86.0	86.6	0.8
Prepared salads	18.7	19.0	20.2	21.2	22.1	4.3

Source: *Euromonitor international, 2015*

Bakery

Sales in this sector increased slightly from US$26.0 billion in 2013 to US$26.4 billion in 2014. However, the sales volume stayed almost constant at 2.5 million tonnes.

Main Sectors

- Sales in the baked goods category, the largest of the bakery category, remained stable at US$21.6 billion in 2014.
- Sales of biscuits also remained stable at US$4.1 billion.
- Breakfast cereals saw increased sales from US$482 million in 2013 to US$539 million in 2014.

Volume Sales of Bakery Products by Sub-category in Thousand Tonnes: 2010-2014

Sub-category	2010	2011	2012	2013	2014	% CAGR 2010-14
Total bakery	**2,542.0**	**2,563.7**	**2,565.9**	**2,569.5**	**2,578.6**	**0.4**
Baked goods	2,270.3	2,289.4	2,290.6	2,289.8	2,296.6	0.3
Biscuits	241.3	242.8	239.7	239.0	236.1	-0.5
Breakfast cereals	30.4	31.5	35.6	40.7	45.9	10.8

Source: *Euromonitor international, 2015*

Main Companies

- Yamazaki Baking Co Ltd retained the leading position in the bakery products category with a 8.2% value share in 2014, followed by Fuji baking Co Ltd. with 4.3% and Shikishima Co. Inc. at 3.0%.

Forecasts for 2015-2019

- Bakery products are projected to post a CAGR of 1.2% in value terms. The biscuits category is anticipated to grow by a CAGR of 1.1%, and breakfast cereals will post a CAGR of 7.5%, validating the convenience trend and time restraints facing Japanese consumers.

Dried Processed Food

In 2014, sales in this sector remained stable with US$23.1 billion, and 4.0 million tonnes.

Main Sectors

- Value sales of rice decreased from US$13.1 billion in 2013 to US$12.8 billion in 2014, while volume saw a slight decrease from 3.3 million to 3.2 million tonnes in the same period.
- In 2014, instant noodles saw a value growth of 1.8% and 0.9% volume growth from 2013, reaching US$5.6 billion and 4.3 million tonnes.
- Sales volume of plain noodles grew by 3% and value sales increased by 2.9% in 2014 to reach an estimated US$1.8 billion.

Volume Sales of Dried Processed Food by Category in Thousand Tonnes: 2010-2014

Category	2010	2011	2012	2013	2014	% CAGR 2010-14
Total dried processed food	**4493.4**	**4410.6**	**4292.5**	**4175.1**	**4068.3**	**-2.5**
Rice	3646.2	3518.6	3406	3269.8	3155.3	-3.6
Instant noodles	391.6	416.4	417.2	431.6	435.7	2.7
Cups/bowl instant noodles	229.2	247.5	250	249.8	248.5	2.0
Plain noodles	196.3	203.7	199.7	207.7	213.9	2.2
Dried pasta	200.4	211.4	208.2	204.1	200.8	0.0
Pouch instant noodles	162.4	168.9	167.2	181.9	187.2	3.6
Instant soup	41.1	42.3	43.6	44.3	44.9	2.2
Dessert mixes	11.9	11.9	11.7	11.5	11.4	-1.1
Dried ready meals	5.5	5.8	5.7	5.8	5.9	1.8
Dehydrated soup	0.4	0.4	0.4	0.4	0.4	0.0

Source: Euromonitor international, 2015

Main Companies and their Japanese Brands

- Japan Agricultural Cooperative (JA Group) retained its leading position in the dry processed food category with a 25.3% value share in 2014, followed by Nissin Foods Holdings Co. Ltd. with 10.6%, and the Japanese consumers Co-operative Union with 6.7%.

Forecasts for 2015-2019

- The dry processed food category is projected to suffer a negative CAGR of 1.0% in value terms from 2015 to 2019.

Organic Products

Japan is facing rapid aging and a low birth rate. According to Euromonitor International's countries and consumers data, the population aged 65 and over increased by a CAGR of 3% in the last decade. In the meantime, the birth rate declined to 7.9 babies per 1,000 people in 2014. These demographic shifts had a significant impact on the organic food sectors. While the aging population bolstered the growth of health and wellness products, the declining birth rate brought about the contraction of organic baby food.

Furthermore, the increasing awareness about the health and safety of food and drinks in the Japanese market prompted consumers to buy more organic products. This was accelerated by the 2011 earthquake and tsunami and the consequent radiation leak from the Fukushima Power Plant. Consumers further became concerned about the origins of what they consume and became more responsible about their choices. Although the prolonged economic recession had made consumers reduce their spending, organic packaged food has continued to grow. Organic packaged food, which is believed to be more trustworthy, increased its sales by about 3% in value terms in 2014 over 2013. Canada has signed an organic equivalence arrangement with Japan effective January 1, 2015. As long as the terms of the arrangement are met, certified organic products from Japan or Canada may be sold as organic in either country. This agreement has the potential to remove additional inspection and certification costs for eligible Canadian and Japanese farms and businesses. For more information, visit the following link:
Japan - Canada Organic Equivalency Arrangement (JCOEA).

Forecast Sales of Health and Wellness Packaged Food by Type: % Value Growth 2013-2018

Category	% CAGR 2013-18	% Total Growth 2013/18
Organic	0.8	4.1
Naturally Healthy (NH)	0.6	3.3
Health and Wellness	0.4	2.2
Fortified/Functional (FF)	0.3	1.5
Better For You (BFY)	-0.3	-1.6
Food Intolerance	-0.4	-2.0

Source: *Euromonitor international, 2015*

NEW PRODUCT CLAIMS

According to the Datamonitor's Product Launch Analytics tool, there were 352 new innovative packaged food products introduced to the Japanese market between January 2014 and December 2014. The top five claims were: licensed; private label; high fibre; high vitamins, and microwavable.

Cakes, pastries and sweet goods was the sub-category that saw the most new innovative products from January 2013 to December 2013, representing 16.3% of all launches, followed by instant noodles, pasta and rice (9.7%). Chilled desserts were in third position, accounting for 7.5% of the new launches.

Top Ten Claims for New Packaged Food Products Launched in Japan from January 2014 to December 2014

Item #	Claims / Tags	% of Claims / Tags	Number of products
1	Licensed	6.51	19
2	Private Label	6.51	19
3	High Fibre	4.11	12
4	High Vitamins	2.74	8
5	Microwaveable	2.74	8
6	Cobranded	2.40	7
7	Double Trademark	2.40	7
8	No Artificial Colour	2.40	7
9	Low Calories	2.05	6
10	No Preservatives	2.05	6
11	Others	66.10	193

Source: *Datamonitor, 2015*

FOR MORE INFORMATION

International Trade Commissioners can provide Canadian industry with on-the-ground expertise regarding market potential, current conditions and local business contacts, and are an excellent point of contact for export advice.

- **Overview of Trade Commissioner Services in Japan**
  http://www.tradecommissioner.gc.ca/eng/offices-japan.jsp

- **Find a Trade Commissioner**
  www.tradecommissioner.gc.ca/eng/find-trade-contacts.jsp

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- ats-sea.agr.gc.ca

For information on FOODEX-JAPAN 2015 exhibition in Tokyo, please contact:

- **Ben Berry, Deputy Director**
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RESOURCES

Canadian Food Inspection Agency, Japan - Canada Organic Equivalency Arrangement (JCOEA) – http://www.inspection.gc.ca/food/organic-products/equivalence-arrangements/japan-overview/eng/1411058101057/1411058102166

Euromonitor International (March 2013), “JA Group (Japan Agricultural Cooperatives).

Euromonitor International (March 2013), “Meiji Holdings Co Ltd”.

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Euromonitor International (March 2013), “Yamazaki Baking Co Ltd”.

Euromonitor International (February 2014), “Packaged Food in Japan”

Euromonitor International (January 2015), “Ready Meals in Japan”.

Euromonitor International (January 2015), “Frozen Processed Food in Japan”.

Euromonitor International (February 2015), “Dry processed food in Japan”.

Euromonitor International (January 2015), “Meal Replacement in Japan”

Datamonitor Product Launch Analytics (February 2015)

Datamonitor Pack-Track packaging innovation (February 2015)

OECD: Japan – Towards a New Dynamic Growth http://www.oecd.org/japan/2013.04_Japan_Brochure_EN.pdf

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