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Global Analysis Report

Modern Grocery Retailing
in Japan

June 2015

EXECUTIVE SUMMARY

Japan's grocery retailers experienced an increase in sales over the 2010-2014 period. However, total market size remained constant at the third-highest in the world after the United States and China. In 2013, approximately 79% of grocery sales occurred within modern grocery retail channels and the remaining 21% within traditional grocery retail. Among modern grocery retailers, supermarkets represented the largest share, accounting for 57% of total sales in 2013. The next largest share was held by convenience stores with 43%, but this channel recorded the highest growth at a compound annual growth rate (CAGR) of 4.4% from 2009 to 2013. Forecourt stores represent a very small portion of modern grocery retailers in Japan (Euromonitor, International, 2015).

In 2014, total consumer expenditure was valued at US$2.7 trillion with per capita consumer expenditure of US$21,505. More importantly, total expenditure for food and beverages, including alcoholic beverages, reached US$438.0 billion, accounting for 16.2% of total consumer expenditure. Per capita expenditure for food and beverages was US$2,897, and alcoholic beverages expenditure was US$551 in the same year (Euromonitor International, 2015).

As Japanese cities have stretched into more and more rural areas, convenience stores and supermarkets have been expanding in these newly developed urban areas, increasing competition within these two channels. Japanese consumers prefer high-quality food and beverages, which encouraged grocery retailers to expand their private labels with higher quality products, but at a relatively competitive price compared to premium products.

CONTENTS

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Growing Forward 2

Canada

SOCIO-ECONMONIC PROFILE

Country Overview

The Japanese economy was stagnant during the 2010-2014 period. In 2011, the country was hit by the Great East Japan Earthquake, triggering a tsunami that caused further damages to infrastructure in north-eastern Japan. However, the country is continuing to slowly recover from the natural disaster. By 2014, Japan's GDP reached US$4.6 trillion following a real GDP growth rate of 0.3% (Euromonitor International, 2015). Japan's economy rebounded from recession in the final quarter of 2014, but growth was weaker than expected.

Consumer Demographics

The total population of Japan dropped to 127.1 million in 2014. By 2024, the number of Japanese citizens over the age of 65 years is expected to increase by 10.7%, to reach 36.6 million, or approximately 30.1% of the total population. In comparison, the proportions of other age segments will see a steady decrease over the same period, reflecting the burgeoning senior market, as well as the country's low birth rate (Euromonitor International, 2015).

The fact that many Japanese women aspire to fulfil themselves outside of the home, and have more opportunities to do so, has contributed to a low marriage rate, as well as increasing instances of co-habitation without children, and a lower fertility rate. In addition, the number of single-person and two-people households is expected to increase slightly by 2024, reaching a total of 29.0 million, while the number of households with more than three people will remain stagnant over the same period, reaching 14.7 million households (Euromonitor International, 2015).

Income and Expenditure

Between 2010 and 2014, annual gross income and disposable income both increased slightly with a CAGR of 0.6% and 0.3%. Average annual gross income per capita was US$31,905 in 2014, and average disposable income was US$23,098 per capita. It is forecast that annual gross income and disposable income will each increase by a CAGR of 1.7% during the 2015-2019 period, and per capita gross income and disposable income at a CAGR of 0.3% each over the same period (Euromonitor International, 2015).

In terms of 2014 expenditures, Japanese people spent the most on housing (25.6% of total expenditure), followed by food and non-alcoholic beverages (13.5%) and transportation (12.3%). These three categories will likely remain the top three expenditures for the 2015-2019 period. Total expenditure for food and beverages, including alcoholic beverages, was valued at US$438.0 billion in 2014, with estimated per capita expenditure for food and non-alcoholic beverages at US$2,897, and US$551 for alcoholic beverages. During the 2015-2019 period, expenditure for food and non-alcoholic beverages is expected to increase by a CAGR of 1.3%, while expenditure on alcoholic drinks is forecasted to increase minimally by a CAGR of 0.8%. An element that will affect consumer expenditures in 2016 is a sales tax increase from 8% to 10%, thus making Japanese consumers more price sensitive (Euromonitor International, 2015).

CONSUMER TASTES AND PREFERENCES

The quality and freshness of food is held in high regard among consumers, and Japan is a leader in the consumption of organic food. Product selection has diversified alongside consumption growth, resulting in a slight decrease in price. However, while Japanese consumers are influenced by price, they are unlikely to compromise the quality and freshness of food products for more affordable pricing. The consumption of organic food and drinks is expected to increase continuously over the 2015-2019 period (Euromonitor International, 2015).

Although Japan remains one of the largest importers of food, genetically modified (GM) foods are not popular in the country. Trust in relation to food is very important to Japanese consumers. In response to consumer expectations, any food product in the Japanese market that contains GM ingredients must be labelled in compliance with local regulations (The Ministry of Agriculture, Forestry and Fisheries of Japan, 2012).

Increases in single-person or two-person (usually couples without children) households, as well as a fast-paced lifestyle, have led to growing popularity of convenient and simple meal options. Therefore, many convenience stores and supermarkets offer diverse selections of chilled ready-meals and noodle soups. Most of these chilled foods are for immediate consumption (within a day or two) since they are made with fresh ingredients. Modern grocery retailers have also developed a wide range of private label meals, meal centres, and side dish items featuring many well-known international cuisines and special regional items, in response to consumers' demand for convenience.

Japanese food embraces diverse types of local and international cuisines. Some cuisines from other countries are well naturalized, integrating a touch of Japanese flare (The Embassy of Japan to Canada, 2012). For example, curry and rice (kare-raisu), originally from India, is quite popular among the Japanese. There are a number of foodservice outlets specializing in curry dishes, as well as many packaged foods, including ready meals, side dishes and snacks, with curry and curry flavour. Another example of this trend is pasta. In general, noodles are popular with the Japanese, whether they are traditional Japanese-style noodles such as soba or ramen, or Italian pasta. In recent years, various types of pasta and pasta sauces were introduced to the market, further establishing pasta's popularity among the Japanese. Other international cuisines that have become popular are French and Korean dishes, which can be easily found at foodservice outlets in the retail sector, and in packaged food products.

GROCERY SHOPPING TRENDS

Due to confidence in brand names, Japanese consumers have generally preferred to purchase famous brand name food products. However, more consumers have been making their selections based on the quality and price of the product in recent years. In addition, young consumers are less focused on buying grocery products based on brand names. While many consumers prefer lower-priced quality products, many others demand premium quality. To appeal to these consumer needs, private labels introduced an increasing number of premium products at a slightly higher price than their comparable standard items. Enhanced food safety, quality, and freshness are the main marketing themes for these premium products.

Along with the growing number of single-person households, there has been an increasing demand for convenience foods such as ready-to-eat, processed and semi-prepared meals for easier consumption at home, while ensuring an appropriate portion for individual consumption. These trends are evident in many supermarkets and convenience store in Japan (Euromonitor International, 2014).

The growing popularity of smartphones and tablets in Japan are likely to drive internet shopping thus affecting internet-based grocery sales in the near future. Although a very small portion of the total grocery retail market, internet grocery retailing has become popular among Japanese consumers, as they seek a more convenient alternative to in-store grocery shopping. Internet grocery shops are usually operated by major convenience and supermarket chains under their popular banners (Euromonitor International, 2014). Japanese consumers are also expected to shop more at convenience stores and chained supermarkets, while seeking better quality options with reasonable prices. In addition, due to the aging population and an increasing number of working moms and small household units, portioned products, internet shopping, and delivery services will continue to grow in popularity.

GROCERY RETAIL SECTOR OVERVIEW

Japan's overall retail sector experienced a slight sales increase over the 2010-2014 period, as did grocery retail. Japan's grocery sales account for approximately 30% of the total retail market, and this proportion will likely remain the same during the 2015-2019 period.

Japan's grocery retail sector was valued at US$326.8 billion in 2013, and saw minimal movement during the 2009-2013 period. While a decrease in consumption could have contributed to this stagnancy, the drop in traditional grocery retail sales, which declined by a CAGR of 5% during the 2009-2013 period, was also a significant factor.

Total sales of modern grocery retailers were valued at US$257.7 billion in 2013. Convenience stores experienced healthy growth with a CAGR of 4.4% from 2009 to 2013, reaching total value sales of US$110.5 billion. Supermarkets maintained the highest grocery sales of any retail format with US$146.9 billion in 2013, despite sales having declined by a CAGR of 0.2% between 2009 and 2013.

Over the forecast period of 2014-18, sales in Japan's grocery sector will likely continue to decrease by a CAGR of 0.2% and end up with value sales of US$323.3 billion by 2018. Over the same period, modern grocery retailers are likely to experience a moderate increase in value sales by a CAGR of 0.4% to reach US$263.0 billion by 2018, while traditional grocery retailer sales will continue to contract, with a CAGR of -2.4%.

Within the modern grocery retail channels, forecourts and supermarkets will also continue to experience further sales contraction at CAGRs of -2.8% and -0.4%, respectively, over the 2014-2018 period. In contrast, convenience store sales will continue expanding, with a CAGR of 1.4% for the same period, reaching US$118.9 billion by 2018.

Japan's Grocery Retail Market Size by Distribution Formats
- Retail Value Sales (Historic/Forecast) in US$ Billions

Category	2009	2013	2014	2018	CAGR % 2009-13	CAGR % 2014-18
Grocery retailers total	**326.5**	**326.8**	**325.7**	**323.3**	**0.0**	**-0.2**
Modern grocery retailers	241.7	257.7	259.1	263.0	1.6	0.4
Convenience stores	92.9	110.5	112.7	118.9	4.4	1.4
Forecourt retailers	0.3	0.2	0.2	0.2	-3.8	-2.8
Supermarkets	148.1	146.9	146.2	143.9	-0.2	-0.4
Traditional grocery retailers	84.8	69.1	66.6	60.2	-5.0	-2.4
Food/drink/tobacco specialists	37.9	28.8	27.5	25.3	-6.7	-2.1
Independent small grocers	28.7	23.5	22.5	19.2	-4.9	-3.8
Other grocery retailers	18.2	16.9	16.6	15.8	-1.9	-1.2

Source: *Euromonitor International, 2015.*
Exchange rate: *A fixed exchange rate at constant 2014 prices is applied for both historic and forecast data at J¥1.00 = US$102.29*
**** CAGR:*** *compound annual growth rate*

DISTRIBUTION FORMATS

Distribution Format Overview

Japanese grocery retailers focus on the easy accessibility of their stores, taking consumer demographics and needs into consideration. Therefore, convenience stores and supermarkets have expanded to become widely available in many areas in the country, except for very remote rural areas. This geographic strategy enables convenience stores and supermarkets to improve or maintain their market share. This trend is forecast to continue in the near future.

Convenience Stores

Convenience stores in Japan are different from the North American concept, in that they are more sophisticated grocery retailers, similar to North American supermarkets, just on a smaller scale. They sell a diverse range of packaged grocery products including chilled ready meals, and ready-to-eat packs of fresh fruit and vegetables (they do not usually sell raw produce). In 2013, convenience stores, such as 7-Eleven and Lawson, fared better than any other distribution channel in Japan. Located on almost every street corner in Japan, convenience stores registered positive sales growth of 4.4% during the 2009-2013 period and are forecasted to continue this growth with a CAGR of 1.4% from 2014-2018. Since these stores are extremely prevalent in the Japanese market and competition between stores and companies is high, retailers are focused on providing more services and products to meet Japan's changing demographics. The top three leading convenience store retailers in 2014 were 7-Eleven Japan, Lawson, and FamilyMart. The positive growth of these retailers is attributed to an increase in store openings in 2013. The most popular products in convenience stores are processed foods and ready meals, and many convenience store companies offer diverse private label packaged foods ranging from economy to premium. In addition, major players, such as 7-Eleven and Lawson, have started home delivery services which cater to elderly consumers and Japanese working mothers (Euromonitor International, 2014).

Supermarkets

Supermarkets in Japan are one of the major places for consumers to purchase fresh food, including meat, seafood, vegetables, and fruit, along with many selections of packaged food. The Japanese supermarket industry is already being affected by the aging population as elderly consumers prefer to shop for groceries closer to home rather than travelling the longer distances to supermarkets. In addition, the supermarket industry in Japan in also being impacted by the growing influence of convenience stores in the country which has left supermarket retailers competing for demand amidst shrinking demand. There are a number of other problems affecting the Japanese supermarket industry, some of which are the weakening value of the yen, a tax hike in 2014, stiffer competition from other retailers in different channels, increases in construction and energy costs, and the decreasing demand for fresh and packaged food (Euromonitor International, 2014).

Department Stores

The low exchange value of the yen along with various promotional packages, which caused a surge of inbound tourists into Japan in 2013, had a positive effect on Japan's department store industry by increasing duty-free sales. The rising increase in department store sales is linked to the gradual recovery of the Japanese economy. This industry is trying to capitalize on the convenience trend by opening a greater number of small format department stores. The focus of these small format stores is to provide various sundries and food items aimed at convenience consumers who prefer Isetan and Mitsukoshi. The Japanese department store channel experienced a CAGR of 0.9% from 2009-2013, reaching value sales of US$64.8 billion. Euromonitor International is forecasting that the Japan department store channel will see a CAGR of -0.9% from 2014-18, dropping to value sales of US$61.1 billion (Euromonitor International, 2014).

MARKET SHARE BY COMPANY

Seven & I Holdings Co Ltd leads all grocery retailers with their popular brand of 7-Eleven which holds 11.9% of the overall grocery retail market share. They also had the most retail outlets (7-Eleven) with just under 16,000 outlets in 2013. Combined, the top five companies (just looking at their major brands) of Seven & I Holdings Co Ltd (7-Eleven), Lawson Inc (Lawson), FamilyMart Co Ltd (Family Mart), AEON Group (MaxValu) and Wal-Mart Stores Inc (Seiyu) accounted for 26.4% of the total market share in 2014 (Euromonitor International, 2015).

As the Japanese grocery market contracted over the 2009-2013 period, competition among grocery retailers became high. This encouraged the major retail groups to increase their outlet numbers by segmenting geographical coverage per outlet, contributing to the growth of convenience stores. This strategy is expected to continue during the 2014-2019 period, thus causing continued and intense competition amongst the over 50,000 convenience store outlets in Japan (Euromonitor International, 2014).

Japan's Grocery Retailers by Brand and Company Share - % of Retail Value Sales

Brand	Company name (GBN*)	2009	2010	2011	2012	2013	2014
7-Eleven	Seven & I Holdings Co Ltd	8.3	8.9	9.7	10.4	11.1	11.9
Lawson	Lawson Inc	5.2	5.4	5.1	5.3	5.2	5.3
Family Mart	FamilyMart Co Ltd	3.5	3.8	4.1	4.3	4.6	4.9
MaxValu	AEON Group	1.9	2.3	2.3	2.4	2.5	2.6
Seiyu	Wal-Mart Stores Inc	1.3	1.6	1.5	1.5	1.7	1.7
Circle K	Alimentation Couche-Tard Inc	1.7	1.8	1.8	1.8	1.7	1.7
Sunkus	Uny Group Holdings Co Ltd	1.7	1.7	1.7	1.7	1.7	1.6
Yamazaki Shop	Yamazaki Baking Co Ltd	1.6	1.6	1.7	1.7	1.6	1.6
Life	LIFE Corp	1.4	1.4	1.5	1.5	1.5	1.6
York	Seven & I Holdings Co Ltd	1.2	1.2	1.2	1.3	1.3	1.4
Ministop	AEON Group	0.9	1.0	1.0	1.0	1.0	1.0
Maruetsu	Maruetsu Inc, The	1.0	1.0	1.0	0.9	1.0	1.0
Valor	Valor Co Ltd	0.8	0.8	0.9	0.9	0.9	1.0
Heiwado	Heiwado Co Ltd	0.9	0.9	0.9	0.9	0.9	0.9
Okuwa	Okuwa Co Ltd	0.8	0.8	0.8	0.9	0.9	0.9
Izumi	Izumi Co Ltd	0.8	0.8	0.8	0.8	0.8	0.8
PIAGO	Uny Group Holdings Co Ltd	0.8	0.8	0.8	0.8	0.8	0.8
Sunny	Wal-Mart Stores Inc	0.7	0.9	0.8	0.8	0.8	0.7
Kasumi	AEON Group	0.6	0.6	0.6	0.7	0.7	0.7
Lawson Store 100	Lawson Inc	0.5	0.6	0.6	0.6	0.6	0.6

Source: *Euromonitor International, 2015* ****GBN:*** *Global Brand Name*

MAJOR GROCERY RETAIL TRENDS

Consumer Segmentation

The aging population appears to be the most influential element of Japan's consumer market. However, the increasing proportion of single women and one- or two-person households are equally important consumer demographics. To appeal to these groups, grocery retailers implemented targeted marketing strategies, such as expanding store outlets in easily accessible locations. In addition, single people or couples without children tend to buy less items and smaller quantities per purchase, but shop more frequently. Therefore, Japanese grocery retailers are opening an increasing number of small- to medium-sized stores to ensure full coverage across most cities, except in very rural areas. More and more retailers are expanding delivery services to better accommodate singles and the senior population. Considering heavy traffic in the city centres, outlets in geographically convenient places ensure retailers can offer timely delivery, while increasing accessibility for shoppers.

The other significant consumer trend in Japan's grocery retail sector is a result of changing gender roles in Japan. Although women were the main purchasers of groceries in the past, as women pursue careers, their influence upon other retail sectors is increasing. As a result, Japanese companies are focusing marketing strategies on these female consumers. For example, convenience stores introduced premium private label products that were designed to appeal to women and older consumers, who are both perceived to favour higher-quality products. Items include chilled ready meals such as bento boxes and salads, as well as desserts and meals that can be boiled in a bag.

Price Polarization - Premiumization vs. Discounting

As income inequality gaps widen in Japan, grocery retailers are introducing products at opposite ends of the price spectrum. This is also evident within private label products, with an increasing number of items claiming to be either premium or economy. The increasing health and safety concerns related to mass-produced food amongst Japanese consumers is in the interest of private label manufacturers, since Japanese consumers normally perceive private label products as safe and of good quality, since they are made by their trusted grocery store. As a result, private label products are not seen as "cheap," but rather, as a range of quality products that are simply less expensive than brand name options. However, among families with children and low-income households, discounted packaged foods are becoming popular.

Even though discount deals have grown in popularity, the word "cheap" is not a preferred marketing campaign among grocery retailers. Therefore, for product marketing, quality is key, which emphasizes the origin of products or ingredients. Furthermore, discounting is often offered through loyalty card programs, a strategy that has been popular among major grocery retail groups in Japan. In recent years, this trend spread to the traditional grocery retail channel as well. Japan's major co-operative wholesalers and independent mom-and-pop shops have launched loyalty card programs that provide customized offers to their members, including discounts and special deals.

Expansion of Internet-Based Retail

Sales through internet retailing in Japan expanded significantly, with a CAGR of 13.2% during the 2010-2014 period, reaching US$68.7 billion in 2014. Total sales of food and drink through internet retail were valued at US$5.3 billion in 2013, with a CAGR of 9.3% during the 2009-2013 period. Online sales of food and beverage products are expected to increase at a CAGR of 8.7% during the 2014-2018 period, reaching a total value of US$8.1 billion, while overall sales within Japan's total grocery retail sector are expected to decline.

The development of Japan's internet retail market is due to reliable logistical systems, low internet fraud rates, and overall convenience along with the rapid growth and penetration of smartphones and tablets. In relation to the grocery retail sector, companies are realizing that there is room to grow through the internet-based market, and are taking advantage of these new opportunities.

Environmentally Friendly Strategies

Environmental management programs are voluntary in Japan, but many retail companies develop and implement their own strategies and measure performance against their own criteria, to appeal to Japanese consumers' environmental awareness. The major corporate social responsibility activities among grocery retailers in Japan are focused on addressing environmental concerns. Common trends among the major companies reflect their commitment to reducing carbon-dioxide emissions in their stores, as well as production and logistical activities. Food recycling programs are also common social responsibility initiatives undertaken by Japanese retailers. Recognizing the environmental impact and economic losses generated from food waste disposal, some major grocery retailers, including 7-Eleven, Circle K Sunkus and Lawson, have launched food recycling programs. Under this program, retailers collect food products from their outlets that are close to or past their expiry dates, which are then used to produce animal feed, compost, industrial products, or fuels by external organizations, or the grocery retailers' joint venture companies.

Another example of environmentally friendly strategies adopted by Japanese retailers is the use of energy-efficient or recyclable goods within their stores. New stores are built with eco-friendly materials, and older locations are renovated to utilize energy efficient products, or alternative energy sources. For example, in 2010 FamilyMart opened an eco-friendly store which included LED lighting, solar-powered systems, and electric car chargers in the parking lot. Circle K Sunkus is also building eco-friendly stores, with energy-efficient equipment and facilities designed to reduce electricity use. In addition, the AEON Group has been the leading retailer in the development of holistic corporate standards on purchasing policies.

Product Introductions and Packaging

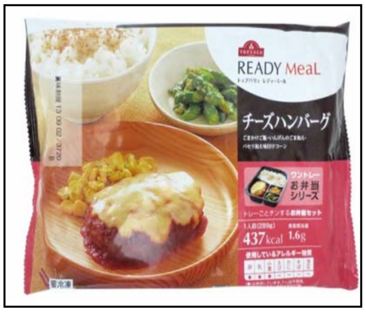
Retailers' environmental initiatives can also be found in new product introductions. For example, the AEON Group sells a selection of products that are certified by the Marine Stewardship Council (MSC). This certification guarantees that fish and seafood products are made of the fish caught in a sustainable way. The line of products includes Alaskan Red salmon, salmon roe, salted mackerel and seasoned cod roe. Additionally, the AEON Group has introduced a brand called Topvalu Kyokan Sengen, which is a line of eco-products marketed as respecting the "4Rs:" reduce, reuse, recycle, and return. This line of products is sold at economy prices, with the purpose of demonstrating to consumers that environmentally friendly products can be affordable (AEON, 2012).

Concerns related to environmentally friendly product packaging are also being addressed by initiatives in Japan's top five retailers. Circle K Sunkus is working towards reducing the use of packaging materials such as cardboard and vinyl, since they are placed in the garbage after products are delivered to stores. Additionally, 7-Eleven Japan is working towards reducing the waste caused by food packing materials. Since 2007, 7-Eleven boxed meals are more often being sealed with tape, instead of completely wrapped in plastic.

Major retailers are also involving consumers in their attempts to reduce the environmental impacts of company activities. In 1991, the AEON Group began a campaign requesting that consumers bring their own shopping bags or baskets, and this campaign was extended in 2000. By 2007, a national campaign to stop giving away free plastic bags was initiated and implemented in approximately 773 AEON Group stores. The AEON Group was motivated to implement these programs in an attempt to reduce the use of petroleum, and reduce carbon dioxide emissions from its activities. Circle K Sunkus has taken a different approach, focusing on reducing the environmental effects of plastic bags by making them thinner, thus utilizing less material (AEON and Circle K Sunkus, 2012).

PRODUCT EXAMPLES

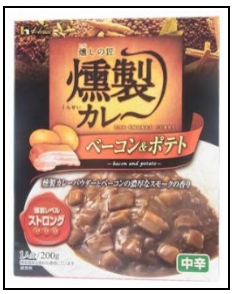
The following are some examples of products launched through modern grocery retail channels in Japan between January 2012 and October 2012, from the Mintel Global New Products Database (2012).



Topvalu Ready Meal On Tray Obento Cheese Hamburger Kit

Company: Aeon
Brand: Topvalu Ready Meal On Tray Obento
Price (US$): 3.75
Category: Meal and meal centres
Launch Type: New variety/range extension
Date Published: September 2012
Packaging: Flexible plastic stand-up pouch
Claims: Microwaveable, economy, on-the-go, easy to use

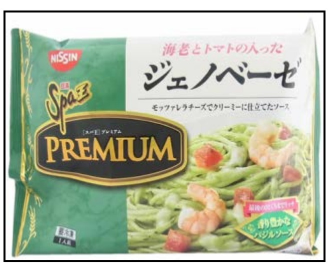
Product Description: Topvalu Ready Meal One Tray Obento Series Cheese Hamburger Meal Kit is comprised of one hamburger topped with tomato sauce and cheese with assorted corn, parsley and green beans. The green beans are flavoured with sesame seeds. The set contains rice and is intended as a lunchbox. This microwaveable product retails in a 289 gram pack.



Smoked Bacon and Potato Curry

Company: House Foods
Brand: House Ibushi No Takumi Kunsei Curry
Category: Meals and meal centres
Packaging: Flexible sachet, metallized film
Launch Type: New product
Price (US$): 2.51
Date Published: August 2012
Claim: Microwaveable

Product Description: House Retort Ibushi No Takumi Kunsei Curry Bacon & Potato (Smoked Bacon & Potato Curry) is a curry with a rich smoky flavour that features curry powder, black pepper, and salt smoked with hickory chips. The bacon and potato variety also features bacon smoked with six types of wood chips including oak and maple. This product retails in a 200 gram pack.

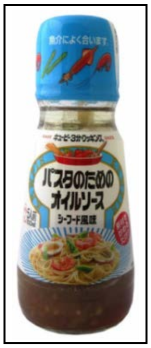


Genovese Pasta with Prawns and Tomato

Company: Nissin Foods
Brand: Nissin Spao Premium
Category: Meals and meal centres
Packaging: Plastic, flexible
Launch Type: New variety/range extension
Price (US$): 3.85
Date Published: March 2012
Claims: Microwaveable, premium

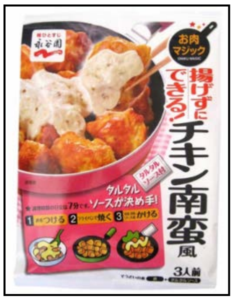
Product Description: Reito Nissin Spao Premium Ebi To Tomato No Haitta Genovese (Genovese Pasta with Prawns and Tomato) is formulated with aromatic basil sauce made with extra virgin olive oil, as well as prawns, tomatoes and mozzarella cheese. This product retails in a 251 gram pack.

Source for all: *Mintel, 2012*



<u>**Seafood Flavoured Oil Sauce for Pasta**</u>
Company: Kewpie
Price (US$): 2.95
Brand: Kewpie 3 Pun Cooking Pasta No Tame No Oil Sauce
Claims: n/a
Date Published June 2012
Category: Sauces and seasonings
Packaging: Glass bottle
Launch Type: New product

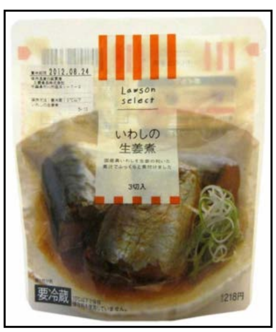
Product Description: Kewpie 3 Pun Cooking Pasta No Tame No Oil Sauce Seafood Fumi (Seafood Flavoured Oil Sauce for Pasta) is a convenient oil sauce that can add a seafood flavour to a variety of pasta sauces. It is to be stir-fried with vegetables and seafood, then tossed with cooked pasta. It has the taste of shrimp, clam, scallops and other seafood, with garlic and black pepper seasoning. It can also be used for chow mein noodles and seafood soups, and retails in a 150 ml bottle.



<u>**Fried Chicken Batter Mix with Tartar Sauce**</u>

Company: Nagatanien
Price (US$): 2.48
Brand: Nagatanien Oniku Magic
Date Published: August 2012
Category: Sauces and seasonings
Claims: Time/speed
Packaging: Flexible sachet, multi-laminate
Launch Type: New product

Product Description: Nagatanien Oniku Magic Agezuni Dekiru! Chicken Nanban Fu is a set of tartar sauce and batter mix for fried chicken. Cuts of chicken legs are to be coated in the batter, fried in a pan (not deep-fried) and served with the tartar sauce. It only takes 7 minutes to prepare a batch of fried chicken. The product retails in an 84.6 gram pack. Sweet and Sour Pork Batter Mix is also available.



<u>**Sardine with Ginger**</u>
Company: Lawson
Price (US$): 2.80
Brand: Lawson Select
Date Published: September 2012
Category: Processed fish, meat and egg products
Packaging: Flexible plastic stand-up pouch
Launch Type: New variety/range extension
Claims: Microwaveable, children (5-12), premium

Product Description: Lawson Select Iwashi No Shoga Ni (Sardine with Ginger) are sardines cooked with soy sauce and ginger. When steamed, the bones will dissolve, making the product safe enough for children. This microwaveable product retails in a 100 gram pack.

Source for all: *Mintel, 2012*

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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RESOURCES

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