



EU-Japan Centre
for Industrial Cooperation
日欧産業協力センター

FOOD SECTOR JAPAN

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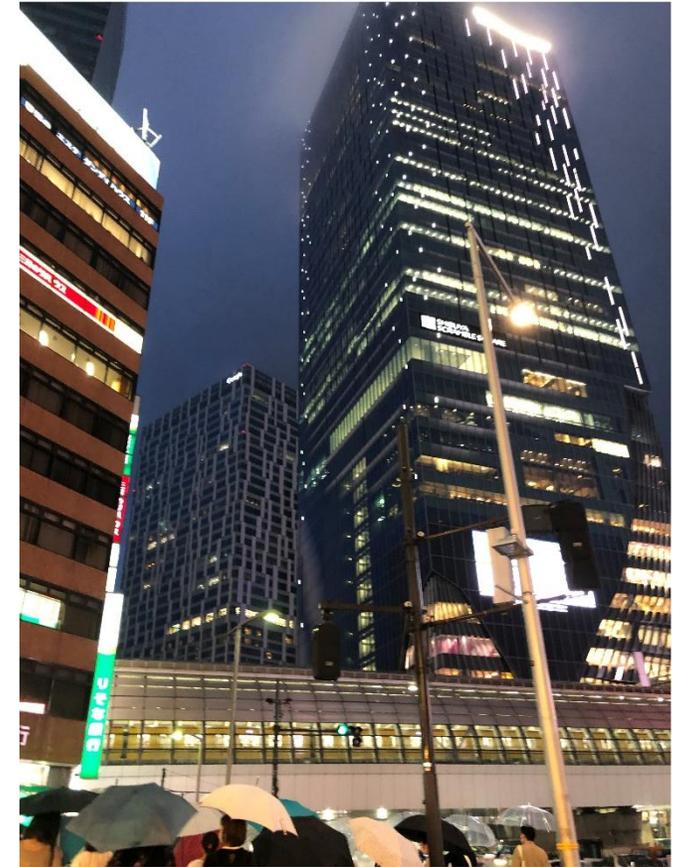
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1. Japan overview

- GDP: 4.19 B USD
- Demography : 123.4 million
 - Declining population + Ageing population
 - Increase of single households (38% in 2020)
 - Urban society: more than 53% of population lives in a metropolitan area



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2. Food Sector: market overview

- Food sector size: estimate 551 B € in 2023 (consumption base)
- Imports:
 - 60 B € in 2024 total
 - Largest partners are US and China
 - 6.6 B€ from EU27**
- Challenges:
 - Self-sustainability challenge
 - Ageing population
 - Supply Chain issues
 - Food price evolution: +17,8% in 2024



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3. Food sector: Finnish commodities

Finland is ranking 18th with a share of 0.4% of the European imports in 2024 in value

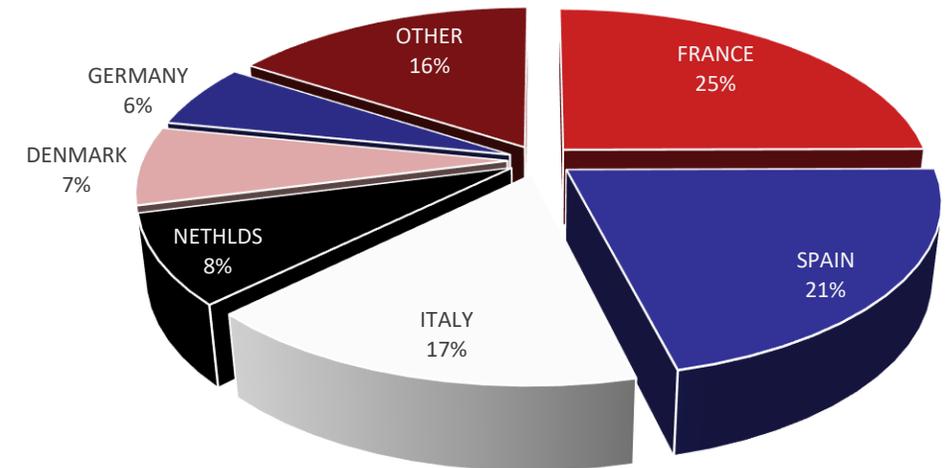
Top 3 products:

- Malt: 5.9 M€
- Swine Meat : 5.8 M €
- Cereal grains: 2,9 M€

	In EUR (1000)	Share
11 Products of the milling industry; malt; starches; inulin;	8.773	53%
02 Meat and edible meat offal	6.518	19%
18 Cocoa and cocoa preparations	2.800	10%
16 Preparations of meat, of fish, crustaceans, molluscs or	2.052	6%
04 Dairy produce; birds' eggs; natural honey; edible prod	1.717	4%
17 Sugars and sugar confectionery	695	1%
03 Fish and crustaceans, molluscs and other aquatic inve	632	1%
22 Beverages, spirits and vinegar	423	1%
10 Cereals	186	1%
Others	374	2%
Grand Total	24.170	100%

*Japan Customs Data, 2024, Imports HS Code 02-04. 07-13, 15-22, exchange rate average 2024 at 1€ = 163,91JPY

EU IMPORT TO JAPAN 2024 in value

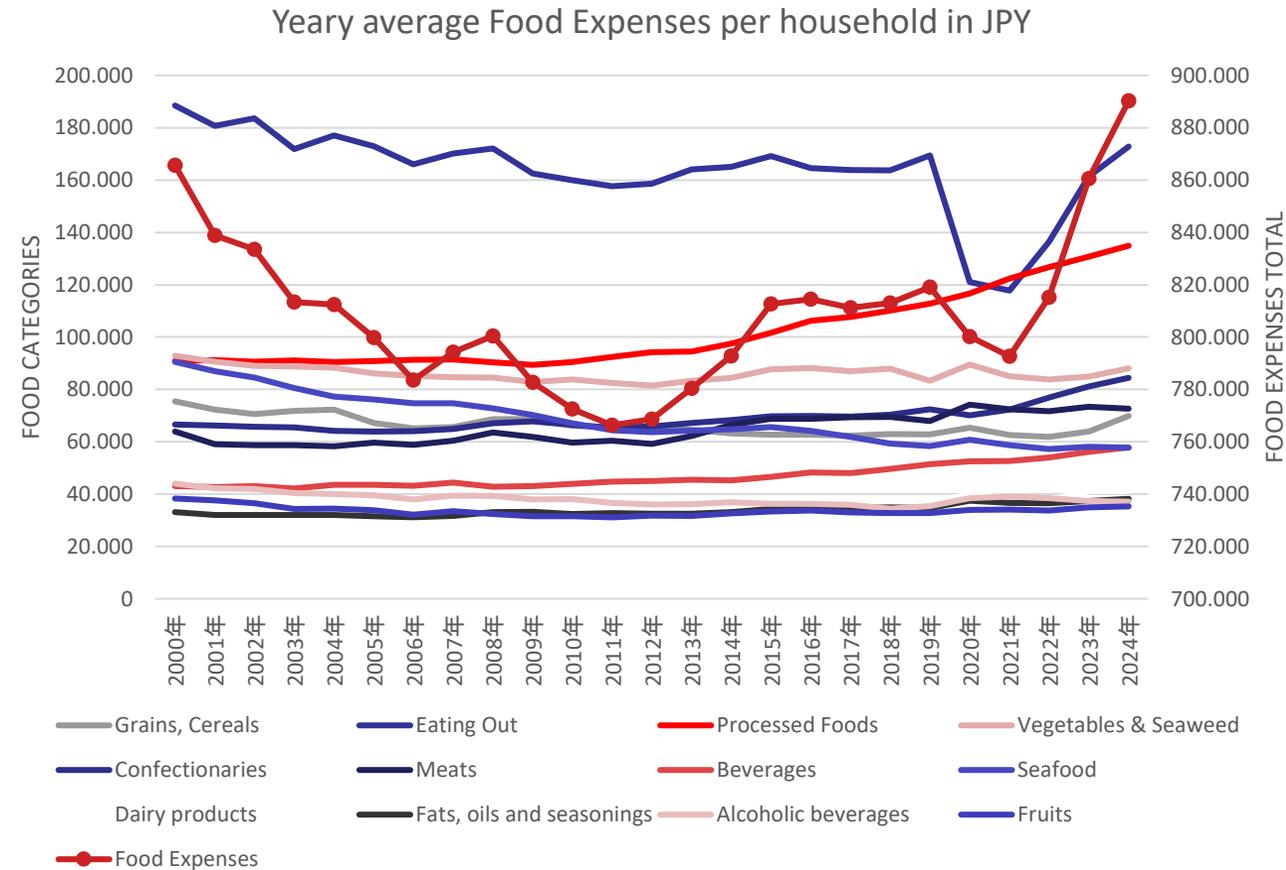


4. Market Structure: Main food categories

Key features of Japanese Diet:

- Local cuisine:
 - Rice based – current noodle boom
 - Vegetables, fermented and pickled foods
 - Fish or meat based

- Changing eating habits
 - Processed foods rising
 - Fresh foods declining
 - Western influence (e.g. Breakfast)
 - Meat on the rise, fish on the decline
 - Eating out stable after recovery



4. Market Structure : Main players

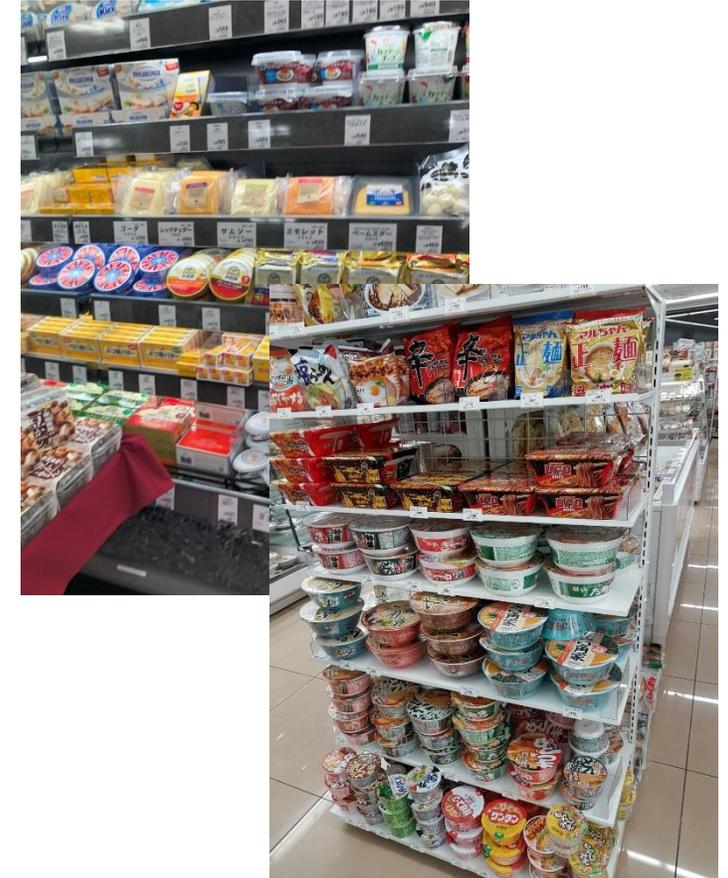
Domination of a few large domestic companies and a wealth of regional or local SMEs

Main Players:

- Ajinomoto
- Nippon Ham
- Meiji
- Suntory
- Kikkoman
- Kewpie
- Nestlé
- Lactalis

Complex network

Manufacturer / Importer / Trading companies / Distributor / Wholesaler
On- and Off-premise POS



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4. Market Structure : Distribution Channels

Food accessibility 24/7 through incredibly dense network across the country

- *Off-premise: 400B € (58% share)*

Supermarkets (> 6k outlets), Convenience stores (> 55k outlets), Discounters (Drugstores, HomeCenters, ...), Department Stores,

E-Commerce: 4,29% share as of 2023

- *On-premise: 121 B € (22%)*

Restaurants & Izakayas, Hotels, Bars, Karaoke & Nightmarket



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5. Insights and trends

Client Insights: 110 million consumers > 15 yo

- Convenience (Processed, frozen etc)
- Packaging sizes (Smaller portions, appropriate storage etc)
- Changes in dietary habits and preferences (Functional foods, snacking etc)
- Women remain key drivers of new trends
- Younger generation more frugal (e.g. Sober curious)



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5. Insights and trends

Japanese consumer are very trend and quality conscious

- Freshness (people shop every day)
- Qualitative, local products
- Seasonality, regionality
- Vegan, Organic options

- Limited Editions, new launches
- Packaging & Presentation
- Private labels (Top Value etc)

- Storytelling, uniqueness
- Partnerships
- Brand experiences
- Loyalty, coupons...



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6. Opportunities and recommendations

Opportunities

- Strong reliance on import foods
- Strong qualitative image
- Curiosity
- Societal challenges (labour shortage, needs etc)
- EPA Framework



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6. Opportunities and recommendations

EPA: “Cheese for Cars”

- Tariff and quota evolution
- Legal Framework

Import Regulations:

- Food sanitation, etc
- Labelling, JAS, packaging, recycling

Local Trade shows



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6. Opportunities and recommendations

- Recommendations:
 - Impeccable product and service offer
 - Importance of understanding local market
 - Education is key
 - Importance of media
 - Endorsement: spokespersons, influencers
 - Finding good partners



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Conclusions

- Dynamic, growing market, yet saturated with local companies
- Societal changes impacting consumption behaviours
- New opportunities and chances





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Q&A Session



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JAPANESE CULTURE & BUSINESS PRACTICES

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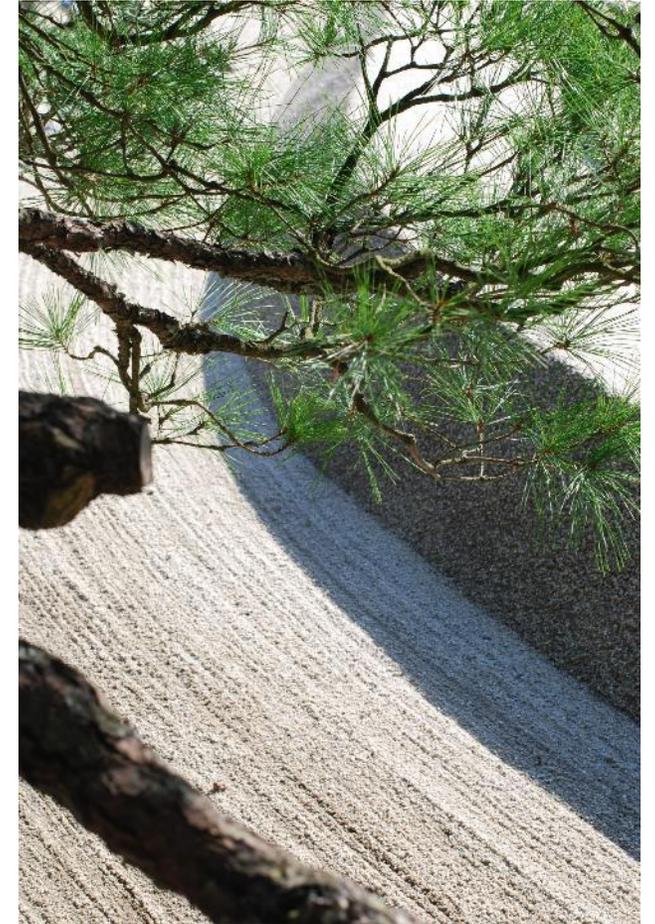
1. Japanese Values and Society
2. Communication recommendations
3. Meeting recommendations
4. Q&A



1. Japanese Values and Society

Culture and Values

- Japanese religions and culture: Shinto, Buddhism and Confucianism
- Values (e.g. Tea ceremony)
 - Harmony (和)
 - Respect (敬)
 - Purity (清)
 - Quietness / simplicity (寂)



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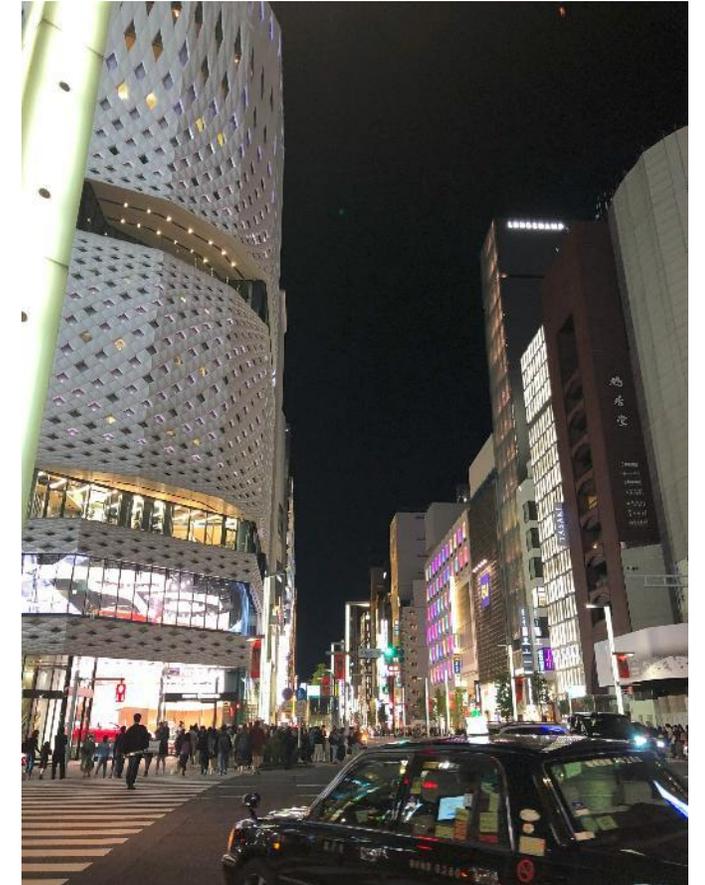
1. Japanese Values and Society

Society structure

- Homogeneous society
- Collectivism and cohesion
- Hierarchy and seniority
- Gender disparities

Key traits:

- Long term orientation
- Ningen Kankei – personal relationship
- Risk aversity

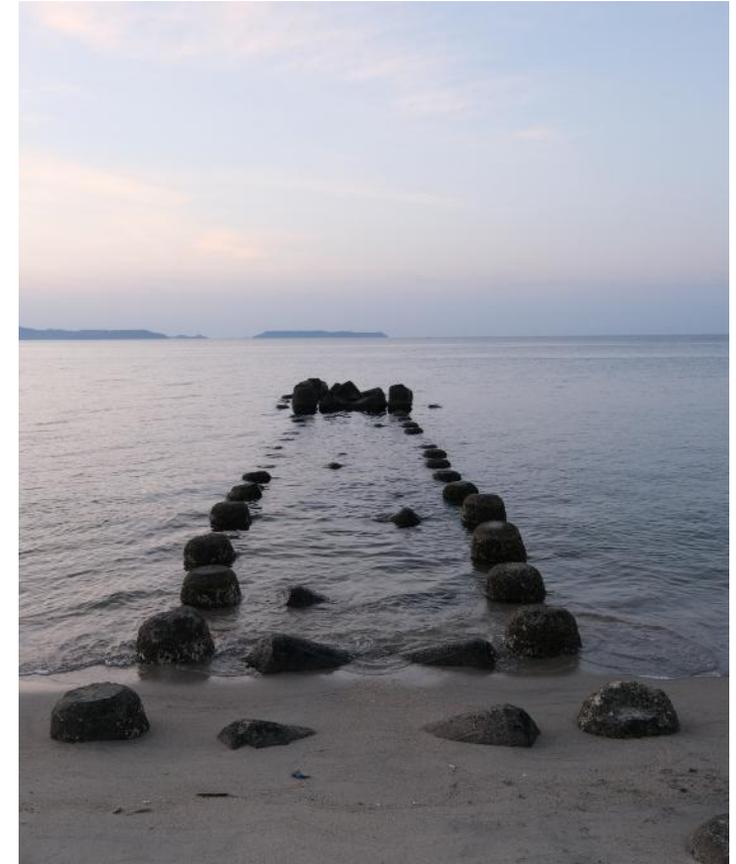


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2. Communication recommendations

High Context Culture

- Verbal and non-verbal communication
 - Reading the air
 - Dealing with ambiguity
- Fostering trust, building relationship
 - Reliability, timeliness
 - After-work socialising



2. Communication recommendations

Communication recommendation

- Written communication:
 - Exchange:
 - Correct addressee(s)
 - Polite small talk and endings
 - Follow-ups
 - Response time
 - Documents:
 - Lots of factual detail, even if it is visually crowded
 - Print outs
- Oral communication:
 - Small talk
 - No interrupting, speak slowly
 - Silence and pauses



2. Communication recommendations

Feedback and Disagreement

- Avoid direct confrontation
- Avoid open disagreement or contradicting in public
- Ask open questions
- Don't be surprised at direct personal questions
- Keep emotions in check
- Apologies and acknowledgement

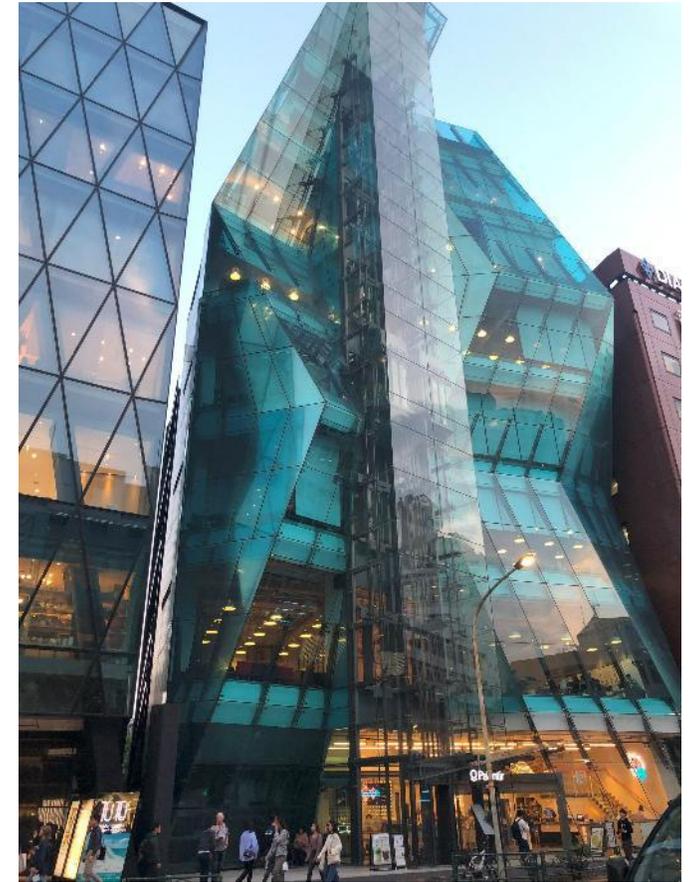


3. Meeting recommendations

Be prepared!

- Check out attendance, location, etc
- Beware of meeting set up!
- Prepare a short self-introduction “Jiko Shōkai”
- Be punctual: 10 minutes early
- Don’t forget your business cards!
- Bring printed material, agenda, hand out for later check
- For first time visits: bring a little souvenir

Remember: Predictability, no surprises!



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3. Meeting recommendations

Dos & Don'ts – go with the flow

- Greeting etiquette:
- Presents: beware of packaging, size, potential pitfalls
- Business socialising:
- Public transportation etiquette
- What to have in your suitcase



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3. Meeting recommendations

Long Term recommendation

- No immediate decision making, group decision
- Processes can take a long time
- Key goal: Long term relationship building
 - Trustworthiness
 - Loyalty
 - Transparency
 - Win Win situation



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