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Report Highlights:

Even with the current economic downturn, the Japanese food market represents significant opportunities for U.S. food exporters. In 2008, the United States exported \$14.8 billion worth of agricultural, fish and forestry products to Japan. Prospective exporters are encouraged to follow regulatory changes in Japan's food safety system and stay up to date with reports from the Agricultural Affairs Office and the Agricultural Trade Offices in Japan.

Post:

Osaka ATO

Executive Summary:

Japan continues to represent one of the best opportunities in the world for U.S. exporters of food products. The total food and drink market in Japan is huge, valued at around \$635 billion, when the food retail sector and the food service sector are combined. In 2008 the United States exported \$14.8 billion worth of agricultural, fish and forestry products to Japan. Even with the current economic downturn, the Japanese food

market represents significant opportunities for U.S. food exporters. Japanese consumers are becoming more health conscious and organic, naturally prepared, and functional foods are growing in popularity. There exist tremendous opportunities for U.S. exporters who are willing to follow the strict regulations and keep up with the fast-moving trends in the market.

A Message from the U.S. Agricultural Trade Offices

Welcome to Japan, the world's largest market for imported consumer oriented food products and the largest overseas market for U.S. food and agricultural exports! We look forward to working with you in this dynamic market.

To assist you, we at the U.S. Agricultural Trade Offices (ATOs) have prepared this Exporter's Guide, the emphasis of which is placed on high-value consumer foods. Its objective is to provide helpful information to U.S. companies that export, or plan to export, to Japan. This guide is organized into four sections and appendices as follows:

- **Market Overview**

A brief description of the market opportunity that Japan represents and how U.S. exporters may best fit into it.

- **Exporter Business Tips**

Practical ideas on how to compete in this market.

- **Market Sector Structure and Trends**

How food products move through the distribution system to the Japanese consumer today and how these channels may change in the future.

- **Best High-Value Import Prospect**

Some of the hottest current import prospects in Japan.

- **Key Tables and Appendices**

Tables and charts to provide information on the Japanese food market and economy, and lists of contacts and potential customers, and other useful information.

To those exporters who are new to Japan, we believe you will find this guide helpful as a starter kit to work in this thriving market. To those who are old Japan hands, we believe you will also find useful information here that you may not have previously considered.

We invite you to contact our offices in Tokyo and/or Osaka if we can assist you in building your Japanese business in any way, or if you have questions or comments on this guide.

Gambatte Kudasai!*

U.S. Agricultural Trade Offices in Japan

*Good luck (or literally in Japanese - "Do your best!")

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I. Market Overview

Japan continues to represent one of the best opportunities in the world for U.S. exporters of food products. In 2008, the United States exported \$14.8 billion worth of agricultural, fish and forestry products to Japan. The total food and drink market in Japan is huge, valued at around \$635 billion, when the food retail sector and the food service sector are combined. If you have a quality product that meets the needs and wants of the Japanese consumers, which can be produced and delivered competitively, and you have patience to research both the differences in consumer tastes and government regulations, you can build an attractive market position in Japan.

Current Trends

Japan's market for high-value foods and beverages continues to change dramatically, with the latest trend being a major thrust toward functional, healthy and nutritious foods. While traditional menus and tastes still generally guide the average Japanese consumer's consumption habits, Western and other Asian ethnic

cuisines are making a major impact in the market.

The Japanese consumers tend to be willing to pay high prices for quality and convenience. However, at the same time, due to the current sluggish economy in Japan, the food industry has recognized that consumers in general demand reasonable prices in addition to quality. Consequently, the industry has responded with 100-yen produce stores and other types of discount food outlets. Some major retail chains are vying for differentiation by introducing their own private branded products and providing consumers with safety assurance by making their meat and produce products traceable back to growers and producers.

As the Japanese population is predicted to decline due to a low birth rate, the Japanese food market is expected to diminish somewhat in the future. Food retailers and food service operators are competing for consumers on a number of fronts, including price, convenience, variety and safety. Some companies are seeking a way to survive in the industry through mergers and acquisitions or tie-ups with partners beyond their traditional business channels.

Japanese Food Self-sufficiency Rate

While it is certain that Japan's Ministry of Agriculture, Forestry and Fisheries (MAFF) works actively to support the interests of Japanese farmers, the Japanese food industry continues to rely on food imports in most categories. Overall Japanese agricultural production has been declining and the Japanese self-sufficiency rate has been hovering around 40%. To counter this trend, MAFF is allowing food corporations to engage in contract farming in certain locations. Nevertheless, the Japanese farming sector keeps declining with the average age of farmers continuing to increase, creating yet another negative impact on its self-sufficiency rate. The Japanese government hopes to raise the self-sufficiency rate by 2015 through encouraging citizens to consume more rice and other domestically produced products, but this policy has had little success to date. Domestic agricultural production is expected to decline further for years to come.

Opportunities for U.S. food exporters

There are many opportunities for alert U.S. exporters. Just a few examples include:

- Organic and natural foods/drinks and functional foods/drinks for the increasingly health-conscious;
- Precooked foods for convenience-conscious Japanese consumers;
- Products in easier-to-open containers for the rapidly growing elderly population;
- Food manufacturers seek quality ingredients and conveniently prepared semi-processed foods that can reduce costs.

Maximum Residue Level

In May 2006, Japan implemented a new system of regulations governing chemical, feed additive and veterinary drug (hereinafter referred to as agricultural chemicals) residues in food. At that time, Japan's Ministry of Health, Labor and Welfare (MHLW) announced provisional maximum residue levels (MRLs) for 758 agricultural chemicals in addition to around 10,000 existing official MRLs. Provisional MRLs will remain "provisional" until they are reviewed and permanent MRLs are established. Since then, permanent MRLs have been established for a number of agrochemicals, with the review for the remaining provisional MRLs expected to take several years to come. These official and provisional MRLs are known as the "positive list".

Under this system, foods containing residues in excess of the established MRLs are regarded as violations of the Food Sanitation Law and rejected at the Japanese port. MRL violations will have adverse effect on the entire U.S. industry as products are subject to strict sanctions resulting in costly testing and lengthy delays at the port. Regarding those agrochemicals not included in the positive list, MHLW has established a uniform limit of 0.01 ppm as the maximum allowable limit. MHLW also applies MRLs to some processed foods as well, mainly to simple processed foods like frozen vegetables and concentrated juice. To products like these, MHLW uses the MRLs of the raw ingredients after taking into consideration the processing factors such as concentration ratios and water content change.

For more information about the positive list system, including the actual MRLs, visit the MHLW's webpage in English at: <http://www.mhlw.go.jp/english/topics/foodsafety/positivelist060228/index.html>

Japan's Market for U.S. Beef

On July 27, 2006, Japan reopened its market to U.S. beef, six and a half months after suspending imports due to a case of non-compliance under the [Export Verification Program](#) (EV) – (See [JA 6009](#)). U.S. beef exported to Japan must be from cattle slaughtered at 20 months of age or below. The age limit creates a limited pool of cattle for the U.S. beef industry to draw from and is a constraint to exports that prevents the United States from reclaiming what was once a \$1.6 billion market. So far, some progress has been made and the Japanese consumers and the industry have begun accepting U.S. beef. In 2008, Japan has imported 54,109 MT of U.S. beef valued at \$303 million. Japan's acceptance of international standards for the trade in beef is considered to be critical in order to reestablish previous trade volumes in the market.

U.S. Advantages and Challenges

The Japanese market offers a number of benefits to U.S. exporters, but it is not without difficulties. To put these opportunities in perspective, here is a list of the most important U.S. "Advantages" and "Challenges":

Table 1. Advantages and Challenges

U.S. Advantages	U.S. Challenges
<ul style="list-style-type: none"> • Strong yen versus weak dollar • U.S. food cost/quality competitiveness • Wide variety of U.S. products - from fresh, to ingredient, to processed • Reliable supply of U.S. agricultural products • Advanced U.S. food processing technology • Positive images of America among the Japanese - such as many of the tourist destinations • Relatively low U.S. shipping costs • Science-based and transparent U.S. food safety procedures • Growing Japanese emulation of U.S. cultural and food trends • Japanese food processing industry seeking new ingredients • Changes in the Japanese distribution system, which is getting similar to that of the U.S. • Low food self-sufficiency rate in Japan • Higher farming costs in Japan • Demand for high-quality healthy and functional foods 	<ul style="list-style-type: none"> • Increasing food safety awareness (BSE, etc.), increasing demands for food quality certifications and production information • Declining price competitiveness • Distance from Japan • Consumer antipathy toward biotech foods and additives • Japanese preoccupation with quality • Consumers “prefer” domestically produced products (image problem with imported food in general) • High cost of marketing in Japan • Japan’s policy to increase food self-sufficiency rate • Labeling laws that are often complicated • High duties on many products • Differences in enforcement of port inspection regulations • Increasing competition with China • Competition with subsidized European exports • Exporters are often expected to commit to special contract requirements and long-term involvement

II. Exporter Business Tips

The following are suggestions on exporting food products to Japan. They are organized under five topics:

- Dealing with the Japanese;
- Consumer preferences, tastes, and traditions;
- Export business reminders;
- Food standards and regulations;
- Import and inspection procedures.

Dealing with the Japanese

Japanese business people, no matter how Western they may appear, do not always approach business relations in the same way as Americans or Europeans do. Some differences are simply due to the language barrier; others are due to differences in deeply held traditions and practices. To help bridge the gaps, we suggest that you:

- Speak slowly and clearly, even if you know that your business counterparts speak English.
- Use clear-cut, simple words and expressions when writing in English.
- Use e-mail and fax, rather than telephone, whenever possible.
- Make appointments as far in advance as practical.
- Carry plenty of business cards (*meishi*). Present them formally at each new introduction—and be sure they have your personal information in Japanese on the back.
- Be on time for all meetings; the Japanese are very punctual.
- Be braced for negotiations which require a number of meetings and probably several trips to reach agreement.
- Be prepared for misunderstandings; use tact and patience.
- Be aware that in Japanese, “*Hai*,” (yes) may mean, “I understand,” not, “I agree.”
- Limit the discussion of business at evening meals, or when drinking with new Japanese counterparts; these occasions are for getting to know one another and building trust.
- Be aware of major Japanese holiday and business break periods, e.g., the New Year holiday (approximately December 30 to January 3); Golden Week, a combination of national holidays (April 29 - May 5); *Obon*, an ancestor respect period lasting for about one week in mid-August during which many companies close and business people take vacations.

Consumer Preferences, Tastes and Traditions

These ideas may help you focus your product approach. Japanese consumers:

- Are very concerned about food safety and traceability – commonly used terms are ‘Anzen’ and ‘Anshin’ that, respectively, mean ‘safety’ and ‘peace of mind’ regarding safety;
- Place great importance on quality—producers that fail to recognize this will not succeed;
- Appreciate taste and all of its subtleties—and will pay for it;
- Are well-educated and knowledgeable about food and its many variations;
- Are highly brand-conscious—a brand with a quality image will sell;
- Care a great deal about seasonal foods and freshness—awareness and promotion of these characteristics, where appropriate, can significantly build product sales and value;
- Are increasingly health-conscious—(Witness the many TV programs about healthy food. When a

product's health attributes are highlighted on such a program, it quickly sells out at the supermarkets.)

Japanese consumers also:

- “Eat with their eyes” and often view food as art. A food product’s aesthetic appearance—on the shelf, in the package, and on the table—is very important in building consumer acceptance.
- Have small families and homes with minimal storage space; thus, large packages are impractical.

Again, as in the United States, there are differences in regional food-related practices, preferences, and tastes. To illustrate, a comparison between the Kanto and Kansai regions is in the chart below.

Table 2. Differences in Food Preferences by Region

Tokyo (Kanto region)	Osaka (Kansai region)
• Less food cost conscious	• More food cost conscious
• More salty foods	• Less salty foods
• More spicy products	• Less spicy products
• More Western products	• Less Western products
• More cuisine variety	• More traditional Japanese foods
• Prefer pork	• Prefer beef
• Prefer buckwheat <i>soba</i> noodles	• Prefer wheat <i>udon</i> noodles

Export Business Reminders

Below are some important reminders about exporting to Japan:

- Before coming to Japan, gather information on Japan by using U.S. sources such as the Foreign Agricultural Service, state agricultural offices, state/regional trade organizations, and JETRO (Japan External Trade Organization) regional offices in the United States (see Appendix D).
- Build at least a minimum team within your company to focus on the Japan market.
- Limit your number of trading partners, but try to avoid exclusive agreements with any one company.
- Use metric terms.
- Quote CIF, unless the importer requests FOB pricing.
- Price competitively; exclude U.S.-based costs, e.g., domestic sales, advertising, marketing, etc.
- Be patient regarding requests for information on ingredient lists, production process, and quality assurance. Ensure that all the information is correct.
- Respond to such requests with diligence and in a timely fashion.
- Use letters of credit to reduce risk.

- Hedge export values with your U.S. bank if you are concerned about exchange rate risk.
- Set up wire transfers for payments.

Food Standards and Regulations

U.S. exporters often find Japanese food standards difficult to deal with. Here are a few tips:

- Read the Japan Food Sanitation Law, <http://www.jetro.go.jp/en/reports/regulations/pdf/food-e.pdf>
- Read the USDA's "Japan: Food and Agricultural Import Regulations and Standards (FAIRS) Country Report 2009." This concise document, covering food laws, labeling, packaging, import procedures, and other key regulations, should be a helpful guide for all food exporters. It not only explains the basics, but also provides specific contact information for all the relevant import agencies. It is updated annually.
- Read other USDA Japan reports and information. Go to the USDA Japan homepage (<http://www.usdajapan.org>) and click the "Reports" menu button to get more market information and reports.
- Check the JETRO report, "Specifications and Standards for Foods, Food Additives, etc. Under the Food Sanitation Law" (<http://www.jetro.go.jp/en/reports/regulations/>). This summarizes specific technical import procedures especially for processed food products.
- Carefully check your food additive admissibility: e.g., preservatives, stabilizers, flavor enhancers. Visit the Ministry of Health, Labor and Welfare's website at <http://www.mhlw.go.jp/topics/yunyu/5/dl/a3.pdf>.
- Ensure that the labeling you plan to use meets Japanese requirements (Food Sanitation Law).
- Verify all relevant import requirements with your Japanese customers. They will normally have the most updated information on Japanese regulations.
- Provide a detailed list of product ingredients to your Japanese partners to allow them to verify their acceptability. Do not assume that U.S. approval means Japanese approval.
- For organic foods in the United States, make sure you obtain USDA's National Organic Program approval. Then, working with your importer, you can register your product under the Japan Agriculture Standard (JAS) before exporting it to Japan. Visit the following website for more information:

NOP Export Arrangement with Japan

(<http://www.ams.usda.gov/AMSV1.0/getfile?dDocName=STELDEV3017307&acct=nopgeninfo>)

- After you have completed the above steps, check with the Agricultural Affairs Office at the U.S.

Embassy in Tokyo (agtokyo@fas.usda.gov) with any remaining questions on issues such as standards, tariffs, regulations, labeling, etc. Depending on content, the ATOs in Japan may also be able to directly respond to your inquiries.

Import and Inspection Procedures

Your job is not complete when your product has been ordered and shipped. You still must get it through Japanese customs and port inspectors. The points outlined below should aid in this process:

- Review the USDA's "Japan: Food and Agricultural Import Regulations and Standards (FAIRS) Country Report 2009" to get a better understanding of these procedures.
- Know the specific tariffs that apply to your product before pricing to potential customers.
- Remember that tariff rates in Japan are calculated on a CIF basis, and that Japan adds a 5% consumption tax to all imports.
- Do not send samples for preliminary checking without an actual request from your importer.
- Recognize that customs clearance officials' application of the law and interpretation of regulations may differ from one port to another. Thus, the least expensive or most convenient port may not be the best choice. Check with your local customer or in-country agent representative.
- Be sure to complete all documentation thoroughly and accurately.
- Send copies of documentation in advance especially for the first-time shipments, which can assist your importer in getting timely release of cargo from customs and clarifying matters with quarantine officials.
- For fresh products, check phytosanitary and other requirements in advance and obtain proper USDA inspections in the United States (see Appendix D of this report, www.aphis.usda.gov, and www.fsis.usda.gov).
- Approval for biotech agricultural products and ingredients is regulated by the Japanese Government. These products will also require specific labeling to be admitted to Japan.
- Make sure you have the proper import documents accompanying shipment: 1) Import Notification; 2) Health Certifications; 3) Results of Laboratory Analysis; 4) Manufacturer's Certification showing materials, additives and manufacturing process. (Note: Products imported for the first time may require more documentation.)

III. Market Sector Structure and Trends

The exporter’s single most important strategic decision—other than those dealing with the product itself—is how to position the product and get it to the Japanese consumer, i.e., through retail, food service, and/or food processing channels. The following is the brief description of the three sectors by channel.

Retail Sector

Japan’s food retail market generated about \$400 billion in 2008. Although it is a huge market, it is highly fragmented. Unlike in North America and the EU, Japan’s retail food sector is characterized by a relatively high percentage of specialty/semi-specialty stores, including “mom-and-pop” stores and local grocery stores. Such small retailers, however, are losing ground to larger general merchandise stores (GMS), supermarkets (SM), and convenience stores (CVS). These three categories, in particular, offer excellent opportunities to U.S. food exporters in spite of severe competition with their counterparts from China, Europe, Australia, and New Zealand as well as domestic manufacturers.

Food retailers in Japan are classified into five major segments. The characteristics of these channels are listed in the following table:

Table 3. Retail Store Opportunities for U.S. Food Exporters

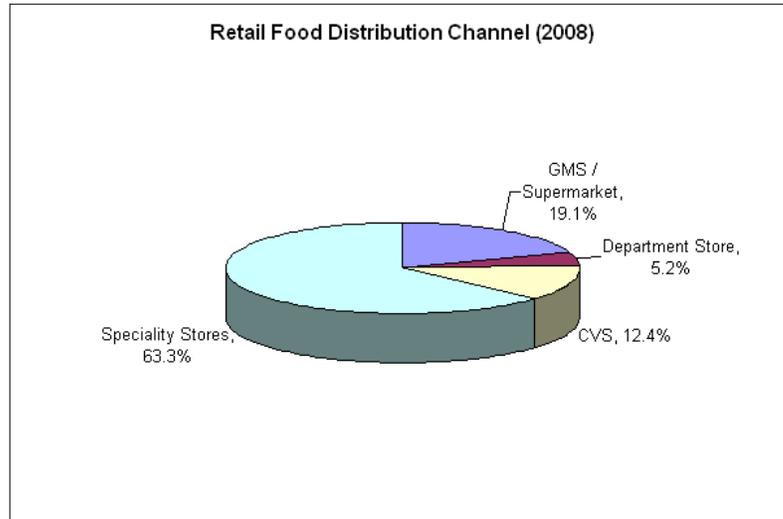
	GMS General Merchandise stores	SM Supermarkets	Department Stores	CVS Convenience stores	Specialty Stores	Semi Specialty Stores
Share (2008)	19.1%		5.2%	12.4%	63.3%	
Future growth expectations*	M	H to M	L to M	H	D	D
Receptivity to imports**	H to M	H to M	M	H to M	M	M
Especially suitable for:						
Established brands	H to M	H to M	H	M	M	M
High quality/high price	H to M	H to M	H	H to M	M	M
Good quality/low price	H	H	M	H	M	M
New products	H	H	H	H	M	M

*Growth expectations: H - high; M - moderate; L - low; D - decline

**Receptivity ratings: H - high; M - medium; L - low

Sources: METI Commercial Census (2008); ATO estimates on import growth and receptivity.

Chart 1. Retail Food Distribution Channel



Source: METI Commercial Census (2008)

General Merchandise Stores: General merchandise stores (GMS), together with supermarkets, are often referred to as “super” in Japan. Japan’s GMS, like super centers in the United States, offers shoppers the convenience of one-stop shopping for groceries, perishables, clothing, household goods, furniture, and electrical goods. Food turnover, which typically used to make up one third of the total sales at GMS’s, now reaches a half of the total sales or even more at some chains. GMS’s are operated by major national chains (Appendix A-1) that have nationwide networks with hundreds of outlets. Central purchasing is typical in these stores.

GMS’s are generally receptive to foreign products, although they often demand product modification to suit market tastes and preferences. They often purchase foreign products via trading companies. Inventory risks, long lead times, and communication problems make GMS buyers hesitant to import products directly. However, as Japan’s retail market becomes more competitive, GMS’s are open to new products and offer excellent opportunities to U.S. food exporters.

Supermarkets: Supermarkets (SM) stores are smaller in size than those of GMS’s and are more specialized in food and household goods. On average, food items such as perishables, readymade-meals, bakery, and refrigerated foods account for 70% or more of the total sales of the stores.

Supermarkets are facing higher purchasing costs than GMS stores. They are seeking a way to survive in the market by product/service differentiation, private brand development, and global sourcing. To gain economies of scale, regional supermarkets are forming alliances, such as joint merchandising companies, with non-competing retailers. Thus, although individual retailers are not large enough to engage in direct

offshore sourcing, through joint merchandising companies, they offer excellent opportunities to U.S. food exporters. These retailers carry imported products particularly as a mean to differentiate themselves from other competing stores in their region.

Department Stores: Department store sales have been declining in recent years due to the economic downturn as well as to increasing competition with GMSs and other retailers. Food sales at department stores currently account for only 5% of the total retail food sales. Nevertheless, department stores offer excellent opportunities for imported high-end food products. They are an under-exploited channel for U.S. exporters (Appendix A-2). Most department stores have extensive basement concessions (i.e., small, independently operated retail stands), otherwise known as ‘depachikas’. There are also outlets operated by department stores themselves, offering an opportunity for U.S. exporters to launch pilot stores or to conduct marketing trials. Department stores provide a showcase of imported, novelty, and high-end products and thus provide U.S. exporters of high-quality and fancy foods with excellent opportunities.

Convenience Stores: Convenience stores (CVS) are becoming an extremely important sales channel in Japan. Convenience stores or “conbini” in Japanese, have small floor space, about 100 m² on average, and typically stock about 3,000 products. They are well known for their high turnover and advanced inventory management.

Convenience stores derive their competitive advantage from high turnover and efficient supply chains. Thus, short lead-time and nationwide distribution are essential in dealing with major CVS operators. While this presents a significant challenge to many overseas companies, indirect business with CVS, nevertheless, offers huge potential to them. Global sourcing of ingredients and raw materials, especially for the use of fast food, has become more popular. CVS operators not only work with consumer product manufacturers but also with trading firms and ingredients manufacturers. In order to differentiate themselves from their competitors, major CVS operators are constantly searching for novelty and new concepts, which offer good opportunities to U.S. food exporters.

Local General and Specialty Stores: Predominantly, Japan’s food retail trade still consists of local specialty stores and grocery shops, most of which are small, family-run operations. These retailers, however, offer limited market potential to exporters. They are served by secondary or tertiary wholesalers, which, in turn, are supplied by Japan’s major wholesalers. This sector has been shrinking rapidly as the food market has become more competitive. Deregulation of liquor licensing, for example, has led to the closure of many small family-owned liquor shops. Only a small group of retailers specialized in imported products in Tokyo

and other metropolitan areas may be able to offer opportunities to U.S. exporters.

Home Meal Replacement (HMR) Sector: As in North America and the EU, the growth of HMR sector is one of the most important developments in the Japanese food sector in recent years. Examples of popular products in this sector are prepared foods sold at supermarkets, takeout meals sold at specialty store chain operators, and various readymade foods sold at convenience and department stores. (There is thus some overlap with the channels outlined above.) Although the growth in the HMR sector is slowing down as well due to the current sluggish economy in Japan, the sector is expected to be an important market as the number of working women, single households and the elderly rises.

The sector consists mostly of small regional companies and is now going through a series of consolidation. Larger companies in the sector supply major supermarket operators and convenience stores, and tenants in department stores. There are a number of constraints facing U.S. exporters in this sector. High-volume buyers are still relatively rare; global sourcing and direct transactions with foreign suppliers are also uncommon. In addition, relatively high turnover for menu items often makes companies hesitant about global merchandising. Nevertheless, HMRs are potentially an ideal customer for U.S. food exporters, especially for those willing to meet stringent cost, quality, and size specifications. The major HMR producers are listed in Appendix B-3.

Overall Trends in the Retail Sector: Private branding, which appeared in the market in the past based on only a low-price strategy and failed, now has settled back into the market. Not only offering low price, private branding in Japan also places more emphasis on quality and safety assurance. Gaining in popularity among Japanese consumers, private branded products are now found at most of the national chain stores, high-end urban retailers and member stores of group cooperatives.

The competition among GMS, Supermarkets, Department stores and Convenience stores has created pressures on Japan's traditional distribution channels to adapt to retailer's needs. Generally, to remain viable, these retail segments are required to pay constant attention to maintaining a large variety of products on the shelves and to be able to adjust quickly to popular consumer trends. To do this, these retailer segments can no longer depend on a distribution channel that does not quickly respond to these requirements. As a result, the GMS segment has continued the trend of increasing direct procurement from producers and/or contracted with certain wholesalers to serve as their own intermediary. In response, smaller less efficient providers in the distribution channel are in the midst of mergers or acquisitions for improved economies of scale

HRI Food Service Sector

The food service sector, which generated \$234.4 billion in sales in 2008, encompasses four major segments: 1) restaurants; 2) hotels and other accommodation facilities; 3) bars and coffee shops; and 4) institutional food service companies serving schools, hospitals, and corporate facilities. The characteristics of the four segments are summarized in the following table.

Table 4. Food Service Opportunities for U.S. Food Exporters

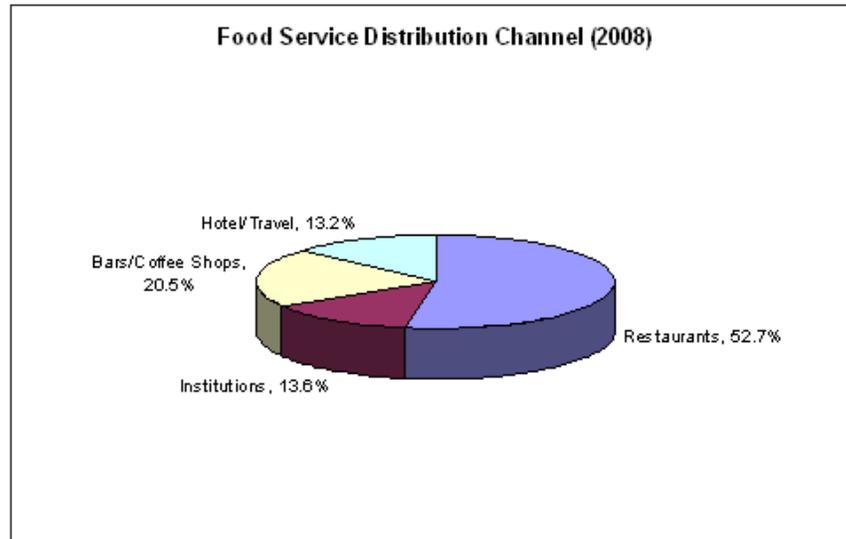
	Restaurants	Hotels/ Travel related	Bars/ Coffee shops	Institutional
Share (2008)	52.7%	13.2%	20.5%	13.6%
Future growth expectations*	H to M	H	H to M	M
Receptivity to imports**	H	H	H to M	H
Especially suitable for:				
High quality/high price	H to M	H	M	L
Good quality/low price	H	H	H	H
New products	H	H	H	H

*Growth expectations: H-high; M-moderate; L-low; D-decline

**Receptivity ratings: H-high; M-medium; L-low

Sources: Food Service Industry Research Center; ATO estimates of import growth and receptivity).

Chart 2. Food Service Distribution Channel (2008)



Source: Food Service Industry Research Center

Table 5. Share of Restaurant Sales by Type of Outlet (2008)

General restaurants	70.7%
Noodle shops	8.4%
Sushi shops	10.7%
Others	<u>10.2%</u>
	100.0%

Restaurants: The restaurant segment offers the best export prospects to the United States among the four food service segments. This segment generates more than a half of the current food service sales and comprises four main types of outlets as shown in the Table 5. The restaurant segment generated approximately JP¥12.87 trillion (US\$ 126.44 billion) in sales in 2008, 0.9% increase following an increase of 0.2% in the previous year. When looking into the figure in detail, “General restaurants” increased their sales by 0.9% and “Others” including fast food shops showed an increase of 3.3%, while both “Noodle shops” and “Sushi shops” declined by 0.2% and 0.1% respectively. Due to the current bad economy in Japan, fast food shops, which offer low-priced menu, showed a strong growth. As with the retail sector, the HRI sector is quite fragmented and most restaurant businesses are quite small. However, small, family-owned restaurants have been disappearing rapidly due to increased competition with HMR, food retailers, and restaurant chain operators.

Several major “family restaurant” chains are increasingly important for U.S. exporters. Because they compete primarily on price, they are active in global sourcing. These chains thus represent a significant opportunity to U.S. food exporters. Chain restaurants are particularly interested in semi-processed or precooked foods. Premixed ingredients, seasonal fruits and vegetables, specialty sauces and seasonings, and desserts are particularly attractive products for chain operators.

Japan has a large and competitive fast food segment made up of both domestic and overseas operators. Most *gyudon* (beef bowl) restaurant chains have long been big U.S. beef buyers, and they suffered major losses from the ban on U.S. beef imports due to BSE. Generally, fast food restaurant operators are volume buyers of specific raw materials. In addition to low cost, suppliers must provide a stable supply of products at a specific quality to compete effectively in this segment.

Exporters can approach most large restaurant chains directly but for the smaller chains, exporters must build relationships with trading companies or major food service wholesalers.

Hotels and travel and entertainment-related: Major hotels are attractive markets for U.S. exporters. They are more oriented toward Western food and frequently have “food fair” promotions featuring a variety of countries’ cuisines. Exporter’s challenge lies in developing effective distribution channels to reach them. Hotels offer high consumer visibility and thus promotional value for exporters. Highlighting the fact that a particular exporter’s product is used by a major upscale hotel chain, for example, is a good way to promote the product to retailers and other prospective buyers.

Railway companies and airlines operate kitchens in Tokyo and Osaka, while the overseas airlines tend to use contract caterers. These Japanese companies tend to emphasize Japanese cuisine and thus are less receptive to imported Western products.

Theme parks are also an important part of the sector. Restaurants and snack outlets at both Tokyo Disneyland and Universal Studio Theme Park, for example, draw millions of visitors every year. Other theme parks around the country also attract thousands of visitors a day and offer opportunities to U.S. food exporters.

Bars and coffee shops: These establishments account for 20.5% of the total food service sales. The sales from the segment showed 1.5% decrease in 2008 following 4.1% decrease in the previous year. While foreign chains such as Starbucks have made significant inroads in Japan over the last few years, coffee shops in general were hit by a major blow showing a decrease of 4.4% due to the bad economy in Japan. Still the segment is a major market for foreign beverages and snack foods.

Institutional food markets: The institutional market comprised of cafeterias at factories, offices, hospitals; and school cafeterias generated \$31.77 billion in 2008, accounting for 13.6% of the total food service sales. The operations of the institutions are typically served by contract caterers. Building relationships with caterers is, therefore, essential to crack this market. Both contract caterers and institutions with their own kitchens are typically serviced by large food service wholesalers. Because the most important criterion for institutional suppliers is cost competitiveness, the sector offers huge market potential to U.S. exporters, which often enjoy significant advantages in this respect.

The institutional catering market shrank in 2008 mainly due to the sluggish economy, characterized by corporate layoffs, consolidation of offices and factories, and cutbacks in corporate fringe benefits. However, long-term prospects are brighter as higher demand from contract caterers serving the hospital and social welfare segments is expected. This growth will be driven by an aging population, reforms of the medical insurance program for the elderly, and the launch of a nursing care insurance program.

Food Processing Sector

Appendix C lists important food manufacturers in several food sectors. These food processors offer a number of opportunities to U.S. exporters, and they have the capacity to buy the following types of products from overseas:

- Ingredients for production in Japan;

- Finished products to be sold under their own labels;
- Finished products to be sold under the exporter's brand, but distributed through the importer's channels.

Dealing with food processors offers advantages as follows:

- They often buy in large volume;
- They have sophisticated distribution systems;
- They have a good understanding of their suppliers' businesses.

Be prepared for requests from Japanese manufacturers, as they are very demanding regarding the release of data on product quality, scientific data, origin of ingredients, and other related information. In large part, the trend in regulations from the Government of Japan requires manufacturers to protect themselves from risks. Such information is also increasingly important because of recent food scandals in Japan, and growing concerns about food safety and traceability among Japanese consumers. U.S. exporters must be prepared to deal positively and promptly with these issues to compete in this market.

For more information on this segment, please read the Japanese Food Processing Sector Report produced by the ATO in Tokyo, Japan (<http://www.fas.usda.gov/gainfiles/200703/146280587.pdf>).

Online Sales in Japan

In 2008 the total number of Internet subscribers in Japan reached 94 million, almost doubled since 2000, when the number of users recorded 48 million. Nowadays, the use of the Internet is getting more and more popular among Japanese people and e-commerce is gaining popularity as well.

Food is one of the main items sold on the Internet. According to a survey conducted by Yano Research Institute, the food sales of GMS, supermarket and CVS through the Internet is increasing and recorded \$222 million in 2008, with its sales expected to grow 26% to reach \$280 million in 2009. Food sales through the Internet are expected to grow rapidly for years to come. The mainstay of the growth of the food sales on the net is considered to be organic food and natural food. The following table shows some of the main websites selling food products.

Table 6. Japan Websites Selling Food Products	
Company Name	Site Address
Rakuten	http://www.rakuten.co.jp/
e-Yukiseikatsu	http://www.eu-ki.com/

Oisix Co., Ltd.	http://www.oisix.com/
Pal System Consumers Cooperative Union	http://www.pal.or.jp/group/
Radish Boya	http://www.radishbo-ya.co.jp/
Polan Organic Farming Association (POFA)	http://www.pofa.jp/
Tengu Natural Foods	http://www.alishan.jp/shop/nfoscomm/catalog/

Population Trends

Japan's population has undergone dynamic shifts in age proportions since the 1980's with decreasing number of births and a growing aging population. Until recently, Japan had been experiencing small but steady annual population growth. It was not until the first half of 2005 that Japan experienced negative population growth, when the number of deaths outnumbered the number of births. According to MHLW, Japan experienced a -0.01% population decline in 2005 for the first time since 1988 when Japan began compiling population statistics. In 2009, Japan's population began at 127.6 million. By the year 2050 Japan's population is predicted to decrease to 95 million, with the ratio of individuals over 65 climbing from 7% (in the 1970's) to 40%.

IV. Best High-Value Import Prospects

The following presents a list of products, which at the present time we believe can be considered "best" import prospects. They were selected based on a number of criteria—high volume, demonstrated growth, and U.S. competitiveness.

Table 7. Best Import Prospects

Product Category	HS Code	2007 Market Size (1,000 MT)	2007 World Imports (1000 MT)	5-Yr Avg. Annual Import Growth	Import Tariff Rate	Key Constraints to Market Development	Market Attractiveness for U.S.A.
Pork	0203	1627	755	-3%	JPY361~482 per kg	Currently, market growth of U.S. beef is not expected to effect consumption of pork, but if Japan were to end age restrictions on beef, pork consumption would fall.	In 2008, pork imports from Jan-Jul have increased by 22% from 2007. This is mainly due to increased production and feed cost of domestic producers.
Snack Food (excl nuts)	1905.90 2106.90.924	327	106	47%	6%~34%	Snack food companies have had products pulled from shelves due to Chinese tainted milk scandal. This could affect U.S. suppliers who use milk products from China as ingredients.	Suppliers that can offer custom packaging and flexibility on ingredients and production process will have greater success over others. Products containing healthy, functional ingredients have

							stronger consumer appeal.
Frozen Vegetables	0710 2004	871	773	11%	6%~23.8%	Recent pesticide contamination in Chinese food products may deter consumers from purchasing frozen food Products. Also, Japanese frozen food companies are becoming more active overseas to bring frozen products into Japan.	The market for imported frozen vegetables has quadrupled over the last 20 years. As Japanese consumers become more familiar with frozen foods, demand will increase. Also, the U.S. is the largest supplier of frozen potato products.
Peanuts	1202		36	-4.74%	JPY617~726 per kg and/or 10%	For around 12 months, starting in late 2007, China halted exports to Japan of large size peanuts due to the increase in pesticide violations. Peanuts from China are inexpensive compared to peanuts from the United States. MRL and aflatoxin are barriers for U.S. shellers to meet Japanese regulations	Because of the problems with Chinese peanuts, Japanese importers want to expand their supply of peanuts to include countries other than China. This situation creates opportunities for U.S. exporters.
High Quality Natural Fruit Juice	2009	901,673 KL	321673 KL	31%	JPY23~27 per kg or 5.4%~29.8%	Strong competition from China and Brazil, with some lesser-producing countries gaining market share as well.	World imports are increasing in Japan as consumers become more health conscious. Imports from the U.S. increased by 22% in 2007, and are expected to increase in 2008. Orange and grapefruit juice have the largest share.
Berries	0810.20 0810.40 0811.20	6.2	4.7	38%	6%~9.6%	The U.S. market share of imports has decreased from 40% to 32% in the last 5 years, and world imports are expected to be low in 2008. Promotional effort is needed.	Varieties falling under HS code 0810.20 have seen a steady increase over the last 5 years. Increasing competition from Mexico is still minor.
Tree Nuts	0801 0802	79	65.6	-24%	Free~12%	While there is currently limited competition from other countries, U.S. producers should keep safety issues a top priority to ensure U.S. exports to Japan remain high.	Increasing consumer awareness and health benefits of nuts has increased consumption recently. Producers should continue promotion in baking and confectionary sectors, as well as exploring new

							sectors.
Wine	2204	239,796 KL	174.441 KL	0.25%	15% or JPY125 per liter, whichever is the less, subject to a minimum customs duty of JPY67 per liter.	Japanese wine market is very competitive, with France and Italy leading exports respectively. The U.S. following with 14.6% of the import market in 2007. While the U.S. has excelled in the lower end of the market, the development of mid-range products will be a challenge for the United States.	Total imports have remained stable, confirming that the Japanese wine market has recovered. The value of U.S. imports has increased due to marketing programs, the strong yen, and increasing sales of more moderately priced New World and California wines.
Pet Food	2309	773	407	-8%	Free~PY59.5 per kg, plus JPY6 for every 1% exceeding 10% by weight of lactose contained.	Contaminated pet food from China has led the Japanese government to create regulations for per food applying to manufacturing, import and distribution. Producers should be sure their products comply.	While the number of pets in Japan is increasing, pet size is decreasing, resulting in less consumption. U.S. producers should concentrate on high-quality products for smaller animals.
Cakes, Waffles, Pies	1905	608	112	51%	9%~29.8%	Rising price of inputs has decreased total world exports to Japan. China has increased market share while U.S. market share has declined over the last 5 years.	The average price for U.S. products remains competitive with China, possibly allowing the U.S. to acquire market share in the wake of Chinese tainted food scandals.
Salmon	0302.12 0303.11 0303.19 0303.22	387	152	-17%	3.5%	Farm raised frozen Salmon from Norway and Chile continues to dominate the market along with an increase in fresh salmon exports from Canada. Prices have risen due to the increase in global oil prices. Reduction in Japanese fish purchases due to a shift towards increased meat consumption.	There is an increase in the demand for U.S. "natural" and "wild" salmon as opposed to the farm raised salmon. Seasonal promotion remains a plus.
Non-alcoholic Beverages	2202.90 2209.00	74,862 KL	72,675 KL	107%	9.6%~13.4%	Competition from the major Japanese domestic brands and the growing variety of other imported non-alcoholic beverages.	Market is continually growing with a strong demand for health conscious and diet drinks. The higher cost of beer and other alcoholic beverages will result in the continued attraction of these alternative products.
Functional Foods	--	JPY1.2 trillion	--	--	See specific product category	Japan has important food standard	The market is growing very

						requirements that must be met. For the Japanese to recognize any new beneficial aspects of food, scientific evidence, education and promotion is necessary.	rapidly, increasing 61% in the past 6 years. The aging population is a growing segment of interest, as well as products targeting specific health conditions.
Food Preparation Products	2106.9	--	369	36%	9%~29.8% +JPY1,159per kg	Health issues are a major concern in Japan. Japanese consumers consider Japanese products to be safer than overseas products, so producers should make sure their products comply with Japanese regulations and be willing to tailor their product to the Japanese market.	Key market drivers such as declining home cooking and greater demand for convenience and ready-to-eat foods indicate that demand for processed food products should continue to grow for the foreseeable future.
Craft Beer	2203	3,491,118 KL	31,830 KL	-11%	Free	Japanese government imposes higher tax on beer compared with other liquors. Five major domestic brewers control 98.4% of the beer market	Redevelopment projects create new pubs and restaurants increasing opportunities for craft beer. Holidays and special occasions offer good times to market high quality products.

Sources: ATOs; Ministry of Agriculture, Forestry and Fisheries; Ministry of Economy, Trade and Industry; Ministry of Finance; Japan Frozen Food Association; Chocolate and Cocoa Association of Japan; Pet Food Manufacturers Association; Zenkoku Seiryoku Inryou Kogyokai; Fuji Keizai; Brewers Association of Japan. Note: The 2007 market size is an estimate made by ATO.

V. Key Tables and Charts

These following tables and charts are included to provide U.S. exporters with a better understanding of Japanese food market and economy.

Table A. Key Trade & Demographic Information

<i>Data is for 2008</i>	
Agricultural Imports From All Countries (\$Mil)/U.S. Market Share (%)	\$79,200 / U.S.24.59%
Consumer Food Imports From All Countries (\$Mil)/U.S. Market Share (%)	\$26,770 / U.S. 19.93%
Edible Fishery Imports From All Countries (\$Mil)/U.S. Market Share (%)	\$14,053 / U.S. 10.69%
Total Population (Millions)/Annual Growth Rate (%) ¹	127.69. /- 0.06%
Number of Major Metropolitan Areas	12
Per Capita Gross Domestic Product (U.S. Dollars) ²	\$34,200 est.
Unemployment Rate (%) ³	4.0%
Percent of Female Population Employed ⁴	46.6%
Exchange Rate (Japan Yen per US\$) ⁵	104.23 (Ann. Avg.)

Statistics Bureau, Ministry of Internal Affairs and Communication; U.S. Bureau of Labor Statistics

1/Total Population/Annual Growth Rate: <http://www.stat.go.jp/english/data/jinsui/2008np/index.htm>

2/CIA World Fact book, and the National Institute of Population and Social Security Research

GDP Per Capita: <https://www.cia.gov/library/publications/the-world-factbook/geos/ja.html>

3/ Unemployment Rate: <http://www.stat.go.jp/english/data/roudou/154b.htm>

4/Percent of Female Population Employed: <http://www.stat.go.jp/english/data/roudou/154b.htm>

*Percent of women in the labor force (15 years old or older).

5/Exchange Rate: http://www.customs.go.jp/toukei/info/index_e.htm

Table B. Consumer Food and Edible Fishery Product Imports

Japanese Imports (in Millions of Dollars)	Imports from the World			Imports from the U.S.			U.S. Market Share %		
	2006	2007	2008	2006	2007	2008	2006	2007	2008
CONSUMER-ORIENTED AGRICULTURAL TOTAL	22,924.99	23,964.73	26,770.13	4,218.53	4,525.64	5,336.42	18.40	18.88	19.93
Snack Foods (excl Nuts)	476.15	518.78	590.09	39.22	40.51	41.25	8.24	7.81	6.99
Breakfast Cereals & Pancake Mix	14.95	16.32	16.29	3.22	2.72	2.31	21.56	16.63	14.16
Red Meats, Fresh/Chilled/Frozen	5,715.85	5,972.38	6,874.68	1,223.79	1,493.35	2,133.85	21.41	25.00	31.04
Red Meats, Prepared/Preserved	1,955.77	2,027.34	2,177.90	206.39	248.75	313.67	10.55	12.27	14.4
Poultry Meat	744.04	752.29	1,376.79	33.85	40.17	50.08	4.55	5.34	3.64
Dairy Products	407.37	553.93	669.35	60.03	74.56	129.95	14.74	13.46	19.41
Eggs & Products	114.58	123.53	116.37	36.85	31.15	42.80	32.16	25.22	25.73
Fresh Fruit	1,523.65	1,577.65	1,787.26	435.03	414.96	418.43	28.55	26.30	23.41
Fresh Vegetables	827.67	661.93	591.43	116.06	98.65	90.24	14.02	14.90	15.26
Processed Fruit & Vegetables	3,381.06	3,430.39	3,399.72	588.37	612.46	674.39	17.40	17.85	19.84
Fruit & Vegetable Juices	632.00	783.53	806.06	102.98	135.92	130.63	16.30	17.35	16.21
Tree Nuts	378.13	347.46	345.65	230.61	212.05	199.44	60.99	61.03	57.7
Wine & Beer	1,229.32	1,317.61	1,406.95	69.55	76.26	79.36	5.66	5.79	5.64
Nursery Products & Cut Flowers	479.80	509.83	535.75	8.23	8.68	8.20	1.72	1.70	1.53
Pet Foods (Dog & Cat Food)	699.99	681.65	795.63	220.01	175.00	199.63	31.43	25.67	25.09
Other Consumer-Oriented Products	3,621.97	3,848.45	4,225.40	810.43	817.12	768.63	22.38	21.23	18.19
FISH & SEAFOOD PRODUCTS	13,523.12	12,763.90	14,052.57	1,256.13	1,171.04	1,502.04	9.29	9.17	10.69
Salmon, Whole/ Eviscerated/Canned	764.31	756.44	784.61	84.38	94.90	95.36	11.04	12.55	12.15
Crustaceans	3,991.10	3,673.02	3,827.85	90.65	67.25	112.54	2.27	1.83	2.94
Surimi (Fish Paste)	691.58	706.58	1,049.02	263.34	256.14	366.31	38.08	36.25	34.92
Molluscs	1,281.58	1,252.23	1,285.93	46.08	45.56	42.26	3.60	3.64	3.29
Other Edible Fish & Seafood	4,538.17	4,197.71	4,536.76	472.71	416.92	520.47	10.42	9.93	11.47
AGRICULTURAL PRODUCT TOTAL	39,384.38	43,601.34	45,019.35	10,183.90	12,456.77	17,085.46	25.86	28.57	31.63
AGRICULTURAL, FISH & FORESTRY TOTAL	64,750.77	68,138.03	79,199.89	12,326.06	14,501.85	19,474.84	19.04	21.28	24.59

Source: World Trade Atlas

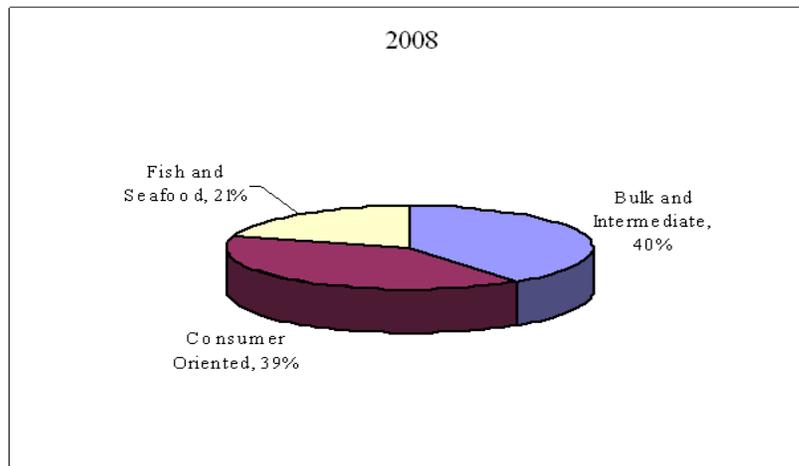
Table C. Top 15 Suppliers of Consumer Foods and Edible Fishery Products

Japan - Top 15 Suppliers				IMPORTS FISH & SEAFOOD PRODUCTS			
CONSUMER-ORIENTED AGRICULTURAL							
\$1,000	2006	2007	2008	\$1,000	2006	2007	2008
United States	4,218,526	4,525,641	5,336,421	China	3,147,946	2,695,145	2,430,397

China	4,253,272	4,213,625	3,695,592	United States	1,256,133	1,171,038	1,502,042
Australia	2,835,087	2,834,009	2,955,101	Russia	982,872	1,018,159	1,281,548
Thailand	1,310,049	1,365,849	1,904,564	Thailand	954,888	971,524	1,113,153
Brazil	899,941	963,366	1,550,994	Chile	911,921	885,811	943,002
France	1,369,693	1,481,741	1,541,726	Vietnam	789,917	688,417	755,695
New Zealand	985,461	1,047,432	1,195,466	Indonesia	697,353	692,798	731,254
Canada	932,253	973,084	1,134,581	Korea South	567,764	526,323	652,420
Denmark	898,955	866,155	975,290	Norway	381,987	441,791	576,787
Philippines	655,191	705,232	917,979	Taiwan	626,584	552,137	564,038
Italy	477,441	533,742	652,792	Canada	434,282	410,963	441,491
Mexico	428,683	471,779	583,418	India	307,233	299,697	310,413
Korea South	461,842	466,379	542,627	Australia	305,982	298,820	290,763
Netherlands	408,631	471,159	496,686	Philippines	175,535	166,632	191,944
Singapore	290,269	343,924	464,233	Spain	107,993	112,749	166,725
Other	2,499,694	2,701,617	2,822,658	Other	1,882,933	1,815,470	2,100,902
World	22,924,988	23,964,734	26,770,128	World	13,523,116	12,763,900	14,052,574

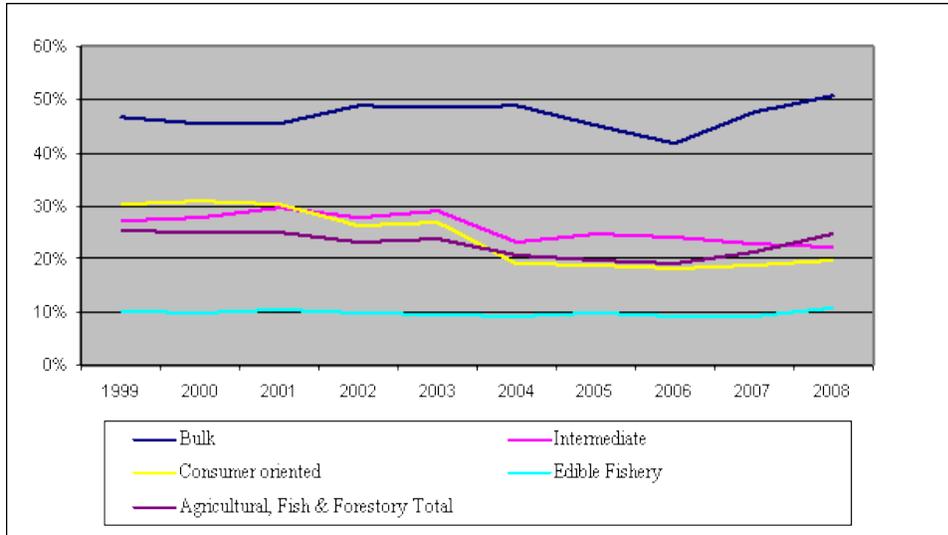
Source: World Trade Atlas

Chart 1. Japanese Food Import Mix from All Sources



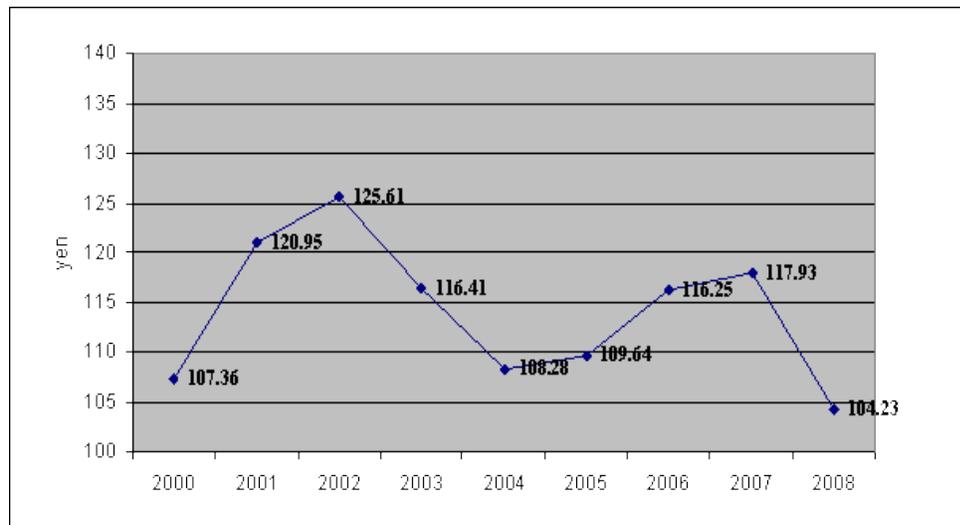
Source: UN Trade Statistics, JBICO, World Trade Atlas

Chart 2. Trends in U.S. Shares of Japanese Food and Agricultural Imports



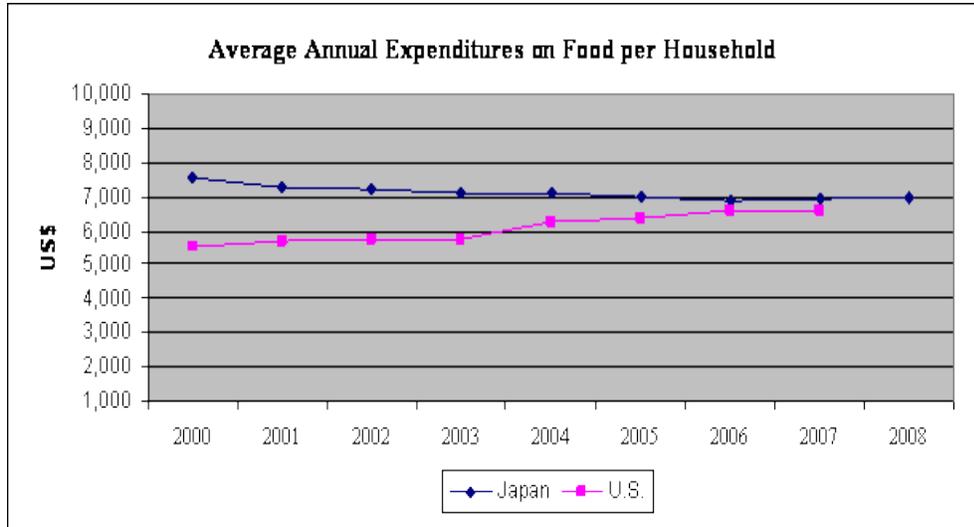
Sources: World Trade Atlas; Japan Customs.

Chart 3. Exchange Rate (JPY per US\$) 1997-2008



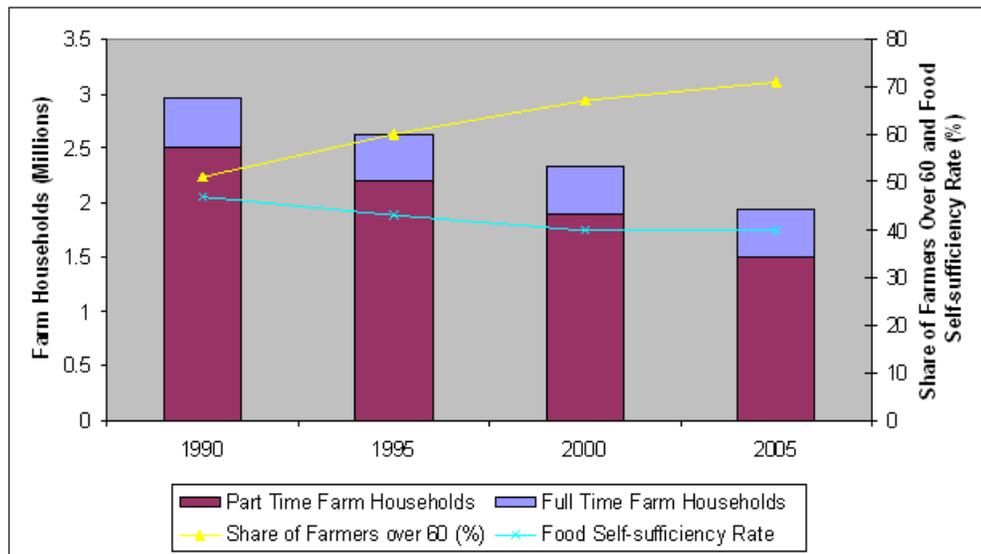
Source: Ministry of Finance

Chart 4. Japan's Food Expenditure Compared to the United States



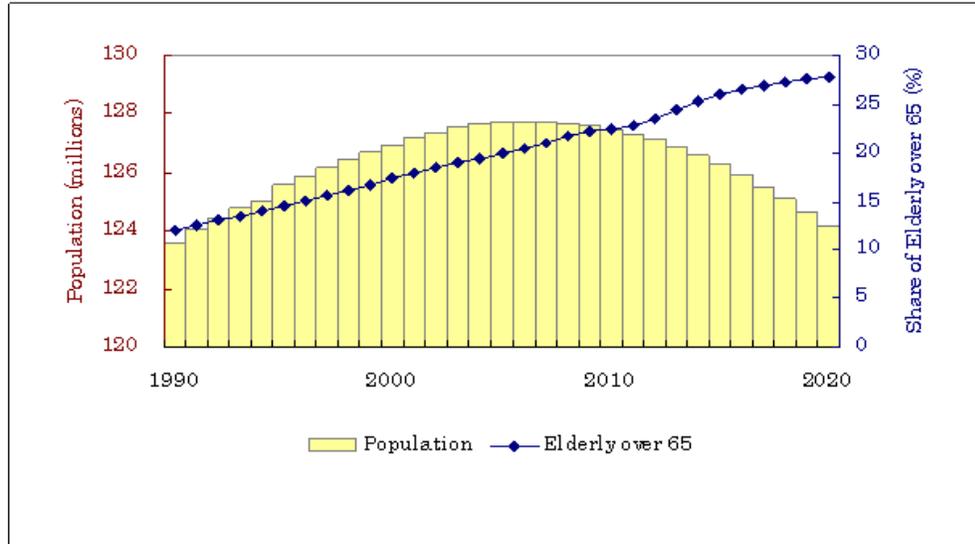
Sources: U.S. Department of Labor; Ministry of Internal Affairs and Communications

Chart 5. Japanese Food Self-sufficiency Rate and Declining Farmer Population (1990-2005)



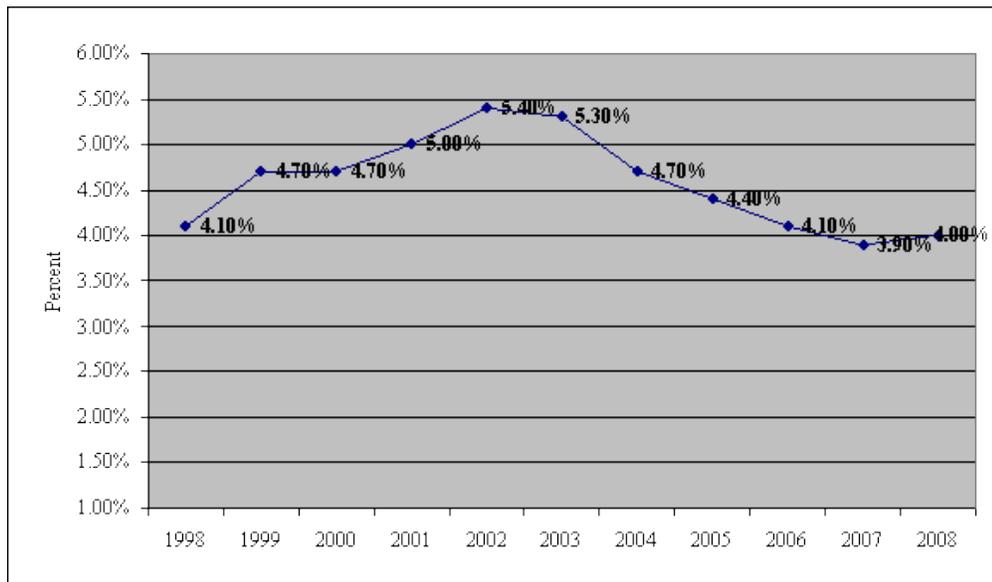
Sources: MAFF Japan

Chart 6. Japan's Population Growth and Expected Decline



Source: National Institute of Population and Social Security Research.

Chart 7. Japanese Unemployment Rate 1998-2008



Source: Ministry of Internal Affairs and Communication

Appendix A. Japanese Retailers

- 2008 Average Exchange Rate of ¥104.23 is used for both Appendix A and B

Table A-1: Top 10 Supermarkets (2008)

Rank	Company Name	Sales US\$ bil.	No. of Outlets	Location	Telephone/Fax URL	Address
1	Aeon Retail	19.52	569	Nationwide	Tel: 81(0)43-212-6000 Fax: 81(0)43-212-6849 www.aeon.info	1-5-1 Nakase, Mihama-ku, Chiba 261-8515
2	Ito-Yokado	14.03	179	Nationwide	Tel: 81(0)3-6238-2111 Fax: 81(0)3-3459-6873 http://www.itoyokado.co.jp/	4-1-4 Shiba-Koen Minato-ku, Tokyo 105-8571
3	Uny	11.42*	229	Nationwide	Tel: 81(0)587-24-8111 Fax: 81(0)587-24-8024 www.uny.co.jp	1 Amaike-Gotandacho, Inazawa, Aichi 492-8680
4	Daiei	9.99*	207	Nationwide	Tel: 81(0)3-6388-7100 www.daiei.co.jp	2-4-1 Shibakoen, Minato-ku, Tokyo 105-8514
5	Izumi	4.80*	83	Kinki, Chugoku	Tel: 81(0)82-264-3211 Fax: 81(0)82-26-5895 www.izumi.co.jp	2-22, Kyobashi-cho, Minami-ku Hiroshima-shi, Hiroshima 732-0828
6	Life Corp.	4.44	201	Nationwide	Tel: 81(0)6-6815-2600 http://www.lifecorp.jp	1-19-4 Higashi Nakajima Higashiyodogawa-ku Osakashi, 533-8558
7	Heiwado	3.95*	104	Kinki, Chubu	Tel: 81(0)749-26-9610 http://www.heiwado.jp/	31, Koizumi-cho, Hikone- shi, Shiga 522-0043
8	Izumiya	3.66*	87	Kinki	Tel: 81(0)6-6657-3310 Fax: 81(0)6-6657-3398 www.izumiya.co.jp	1-4-4 Hanazono-Minami, Nishinari-ku, Osaka 557- 0015
9	Yorkbenimaru	3.35	203	Nationwide	Tel: 81(0)24-924-3211 http://www.yorkbeni.co.jp/	2-18-2 Asahi, Gunsan-shi, Fukushima-ken
10	Maruetsu	3.28*	245	Kanto	Tel: 81(0)3-3590-1110 Fax: 81(0)3-3590-4642 www.maruetsu.co.jp	5-51-12 Higashi-Ikebukuro, Toshima-ku, Tokyo 170- 8401

Sources: Nikkei Marketing Journal "Retail Sector Ranking 2008" (June 24, 2009), and company annual reports. * Sales are shown by consolidated base.

Table A-2: Top 10 Department Stores (2008)

Rank	Company Name	Sales US\$ bil.	*No. of Outlets (Domestic)	Location	Telephone/Fax URL	Address
1	Takashimaya	9.37*	20	Nationwide	Tel: 81(0)6-6631-1101 Fax: 81(0)6-6632-5195 www.takashimaya.co.jp	5-1-5 Namba, Chuo-ku, Osaka 542-8510
2	Mitsukoshi	6.12	13	Nationwide	Tel: 81(0)3-3241-3311 Fax: 81(0)3-3242-4559 www.mitsukoshi.co.jp	1-4-1 Nihonbashi- Muromachi, Chuo-ku, Tokyo 103-8001
3	Sogou	4.63	28	Kansai	Tel: 81(0) 6-6281-3111 www.sogo-gogo.com	1-8-3 Chuo-ku Shinsaibashisuji Osaka 542-0085
4	Daimaru	4.35	6	Nationwide	Tel: 81(0)6-6271-1231 Fax: 81(0)6-6245-1343 www.daimaru.co.jp	1-7-1 Shinsaibashi-Suji, Chuo-ku, Osaka 542-8501
5	Seibu	4.32	28	Kanto, Kinki, Hokkaido	Tel: 81(0)3-3981-0111 http://www2.seibu.co.jp	1-28-1 Minami Ikebukuro Toshima-ku, Tokyo 171- 8569
6	Isetan	4.17	7	Kanto	Tel: 81(0)3-3352-1111 Fax: 81(0)3-5273-5321 www.isetan.co.jp	3-14-1, Shinjyuku, Shinjyuku-ku, Tokyo, 160- 8011
7	Hankyu-Hanshin	3.74	15	Kinki, Kanto	Tel: 81(0)6-6361-1381 Fax: 81(0)6-6486-6048	8-7 Kakuta-cho Kita-ku, Osaka 530-8350

					www.hankyu-dept.co.jp	
8	Tokyu	2.73*	11	Kanto	Tel: 81(0)3-3477-3111 Fax: 81(0)3-3496-7200 www.tokyu-dept.co.jp	2-24-1 Dogenzaka, Shibuya-ku Tokyo 150-8019
9	Kintetsu	2.69*	13	Kinki	Tel: 81(0)6-6624-1111 www.d-kintetsu.co.jp/	1-1-43 Abenosuji Abeno-ku, Osaka 545-8545
10	Matsuzakaya	2.49	8	Nationwide	TEL : 81(0)52-251-1111 http://www.matsuzakaya.co.jp/	3-16-1 Sakae, Kana-ku, Nagoya-shi, Aichi-ken 460-0008

Sources: Nikkei Marketing Journal "Retail Sector Ranking 2008" (June 24, 2009), and company annual reports. * Sales are shown by consolidated base.

Table A-3: Top 10 Convenience Stores (2008)

Rank	Store Name (Parent)	Sales US\$ bil	No. of Outlets	Location	Telephone/Fax URL	Address
1	Seven-Eleven (Seven & I Holdings)	26.50	12,382	Nationwide	Tel: 81(0)3-6238-3711 www.sej.co.jp/english	2-8-8 Chiyoda Chiyoda-ku, Tokyo 102-8455
2	Lawson (Mitsubishi)	14.96	9,527	Nationwide	Tel: 81(0)3-5435-2770 www.lawson.co.jp	6th floor East Tower, Gate City Ohsaki, 1-11-2, Osaki Shinagawa-ku Tokyo 141-8643
3	Family Mart (Itochu)	11.95	14,651	Nationwide	Tel: 81(0)3-3989-6600 Fax: 81(0)3-5396-1810 www.family.co.jp	4-26-10 Higashi- Ikebukuro, Toshima-ku, Tokyo 170-8404
4	CircleK Sunkus (Uny)	8.55	6,166	Nationwide	Tel: 81(0)3-6220-9000 http://www.circleksunkus.jp/english/	2-28-2 Shiba, Minato-ku, Tokyo 105-8539
5	Mini-Stop (AEON)	2.91	3,270	Kanto, Tokai, Kinki	Tel: 81(0)43-212-6471 www.ministop.co.jp	1-5-1 Nakase, Mihama-ku, Chiba 261-8515
6	Daily Yamazaki (Yamazaki)	2.06	1,647	Nationwide	Tel: 81(0)47-323-0001 Fax: 81(0)47-324-0082 www.daily-yamazaki.co.jp	Sun Plaza 35 Bldg., 1-9-2 Ichikawa, Ichikawa- shi, Chiba 272-8530
7	Seiko Mart	1.53	1,049	Hokkaido	Tel: 81(0)11-511-2796 Fax: 81(0)11-511-2834 www.seicomart.co.jp	Park 9-5 Bldg., Nishi 6, Minami 9, Chuo-ku, Sapporo 064-8620
8	AM/PM (Rex Holdings)	1.45	1,129	Nationwide	Tel: 81(0)3-5544-2610 Fax: 81(0)3-5211-3593 www.ampm.co.jp	13-1 Ichibancho, Chiyoda- ku Tokyo 102-0082
9	Three F Co., Ltd.	1.08	650	Kanto	Tel: 81(0)45-651-2111 www.three-f.co.jp/	17 Nihon-Odori, Naka-ku Yokohama 231-8507
10	Popular	1.00	701	Nationwide	Tel : 81(0)82-837-3500 Fax : 81(0)82-837-3540 http://www.poplar-cvs.co.jp/	665-1 Oazakuchi Asa-cho, Asakita-ku, Hiroshima-shi, Hiroshima-ken 731-3395

Sources: Nikkei Marketing Journal "Convenience Store Ranking 2008" (July 22, 2009), and company annual reports. Sales are shown by consolidated base.

Table A-4: Top 10 Food Wholesalers (2008)

Rank	Company Name	Sales US\$ bil	Location	Telephone/Fax URL	Address
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1	Kokubu	14.12*	Nationwide	Tel: 81(0)3-3276-4000 Fax: 81(0)3-3271-6523 www.kokubu.co.jp	1-1-1 Nihonbashi, Chuo-ku, Tokyo 103-8241
2	Ryoshoku	13.45*	Nationwide	Tel: 81(0)3-3767-5111 Fax: 81(0)3-3767-0421 www.ryoshoku.co.jp	6-1-1 Heiwajima, Ota-ku, Tokyo 143-6556
3	Nippon Access	13.12*	Nationwide	Tel: 81(0)3-6859-1111 Fax: 81(0)3-3410-4626 www.nippon-access.co.jp	3-1-3 Ikejiri, Setagaya-ku, Tokyo 154-8501
4	Kato Sangyo	6.15*	Nationwide	Tel: 81(0)798-33-7650 Fax: 81(0)798-22-5637 www.katosangyo.co.jp	9-20, Matsubara-cho, Nishinomiya-shi, Hyogo 662-8543
5	Itochu Foods	5.80*	Nationwide	Tel: 81(0)6-6947-9811 Fax: 81(0)6-6947-9510 www.itochu-shokuhin.com	2-2-22 Shiromi, Chuo-ku, Osaka 540-5822
6	Nihon Shurui Hanbai	4.82*	Nationwide	Tel: 81(0)3-3273-4955 Fax: 81(0)3-3273-1786 www.nishuhan.co.jp	International Division 2-2-1 Yazsu, Chuo-ku, Tokyo 104-8466
7	Mitsui Foods	4.81*	Nationwide	Tel: 81(0)3-3551-1211 Fax: 81(0)3-5541-7467 http://www.mitsuifoods.co.jp/	2-10-9 Hacchobori, Chuo-ku, Tokyo 104-8277
8	Asahi Shokuhin	3.46*	Nationwide	Tel: 81(0) 88-882-7111 www.asask.co.jp	2-15-5 Minami Harimaya- cho Kochishi, Kochi 780- 8505
9	Meidi-ya Shoji	3.30	Nationwide	Tel: 81(0)3-3271-1111 Fax: 81(0)3-3273-6360 www.meidi-ya.co.jp	2-2-8, Kyobashi, Chuo-ku, Tokyo 104-8302
10	Food Service Network	3.02*	Nationwide	Tel: 81(0)3-5652-6300 Fax: 81(0)3-5652-6310 www.fsnltd.co.jp	3-15-1 Nihonbashi Hamamachi Chuo-ku, Tokyo 103-0007

Sources: Nikkei Marketing Journal "Wholesaler Ranking 2008" (July 29, 2009), and company annual reports. *Sales are shown by consolidated base.

Appendix B. Japanese Food Service Companies

- 2008 Average Exchange Rate of ¥104.23 is used for both Appendix A and B

Table B-1: Top 10 Commercial Restaurant Food Service Companies (2008)

Rank	Company Name	Sales US\$ bil.	No. of Outlets	Location	Telephone/Fax URL	Address
1	McDonald's Japan	4.97	3,754	Nationwide	Tel: 81(0)3-3344-6251 Fax: 81(0)3-3344-6769 www.mcdonalds.co.jp	6-5-1 Nishi-Shinjuku, Shinjuku-ku, Tokyo 163- 1339
2	Skylark	2.56	2,403	Nationwide	Tel: 81(0)422-51-8111 Fax: 81(0)422-37-5240 www.skylark.co.jp	1-25-8 Nishi-Kubo, Musashino-shi, Tokyo 180-8580
3	Nissin Health Care Food Service	1.60	4,190	Nationwide	Tel: 81(0)3-3287-3611 Fax: 81(0)3-3287-3612 www.nifs.co.jp	2-7-3 Marunouchi, Chiyoda-ku, Tokyo, 100- 6420
4	Plenus	1.45	2,431	Nationwide	Tel: 81(0)92-452-3600 www.plenus.co.jp/	1-19-21 Kamimuta, Hakata-ku, Fukuoka 812- 8580
5	Zensho	1.35	1,203	Nationwide	Tel: 81(0)3-5783-8850 http://www.zensho.co.jp/en/	JR Shinagawa East Bldg 6F-8F, 2-18-1 Konan, Minato-ku, Tokyo 108- 0075
6	Monterozza	1.30	1,463	Nationwide	Tel: 81(0)422-36-8888 Fax: 81(0)422-36-8988	1-17-3 Nakamachi, Musashino-shi, Tokyo

					www.monteroz.co.jp	180-0006
7	Kentucky Fried Chicken Japan	1.30	1,516	Nationwide	Tel: 81(0)3-3719-0231 Fax: 81(0)3-5722-7240 http://www.kfc.co.jp/	1-15-1 Ebisu-Minami, Shibuya-ku, Tokyo 150-8586
8	Duskin (Mister Donut)	1.19	1,329	Nationwide	Tel:81(0)6-6821-5006 Fax: 81(0)6-6821-5357 www.duskin.co.jp	1-33 Toyotsu-cho, Suitashi, Osaka 564-0051
9	Reins International	1.10	1,283	Nationwide	Tel: 81(0)3-5544-2001 www.reins.co.jp/	1-8-7 Roppongi, Minato-ku, Tokyo 106-0032
10	Honke Kamadoya	1.07	2,265	Nationwide	Tel: 81(0)78-251-3050 Fax: 81(0)78-251-3146 www.honkekamadoya.co.jp	1-1-5 Nunobikimachi, Chuo-ku, Kobe, Hyogo 651-0097

Sources: Nikkei Marketing Journal "Food Service Ranking 2008" (May 13, 2009), and company annual reports. Sales are shown by consolidated base.

Table B-2: Top 5 Institutional Food Service Companies (2008)

Rank	Company Name	Sales US\$ bil.	Location	Telephone/Fax URL	Address
1	Nisshin Healthcare Food Service	1.60	Nationwide	Tel: 81(0)3-3287-3611 Fax: 81(0)3-3287-3612 www.nifs.co.jp	2-7-3 Marunouchi, Chiyoda-ku, Tokyo, 100-6420
2	Aim Services	0.93	Nationwide	Tel: 81(0)3-3592-3721 Fax: 81(0)3-3502-6580 www.aimservices.co.jp	1-1-15 Nishi-Shimbashi, Minato-ku, Tokyo 105-0003
3	Green House	0.81	Kanto	Tel: 81(0)3-3379-1211 http://www.greenhouse.co.jp/	3-2-17 Nishishinjuku, Shinjuku-ku, Tokyo 163-1477
4	Seiyo Food Compass Group	0.79	Nationwide	Tel: 81(0)3-3984-0281 Fax: 81(0)3-3983-3475 www.seiyofood.co.jp	3-13-3, Higashi Ikebukuro, Toshima-ku, Tokyo, 170-0013
5	Fuji Sangyo	0.61	Nationwide	Tel: 81(0)3-5400-6111 http://www.fuji-i.com/	5-32-7 Shinbashi, Minato-ku, Tokyo, 105-0004

Sources: Nikkei Marketing Journal "Food Service Ranking 2008" (May 13, 2009), and company annual reports. Sales are shown by consolidated base.

Table B-3: Top 5 Home Meal Replacement Sector and Bento Producers/Marketers (2008)

Rank	Company Name	Sales US\$ bil.	No. of Outlets	Location	Telephone/Fax URL	Address
1	Plenus	1.45	2,431	Nationwide	Tel: 81(0)92-452-3600 www.plenus.co.jp/	1-19-21 Kamimuta, Hakata-ku, Fukuoka 812-8580
2	Honke Kamadoya	1.07	2,265	Nationwide	Tel: 81(0)78-251-2308 Fax: 81(0)78-251-3146 www.honkekamadoya.co.jp	1-1-5 Nunobikimachi, Chuo-ku, Kobe, Hyogo 651-0097
3	Four Seeds (Pizza-La)	0.58	693	Nationwide	Tel: 81(0)3-3409-6000 Fax: 81(0)3-5466-4400 www.pizza-la.co.jp	5-12-4 Zenkaren build. 5 th floor, Minami Aoyama Minato-ku Tokyo, 107-0062
4	Origin Toshu	0.454	592	Nationwide	Tel: 81(0)3-3305-0180 Fax: 81(0)3-3305-0330 www.hurxley.co.jp	3-2-4 Sengawacho, Chofu, Tokyo 182-0002
5	Rock Field	0.450	307	Nationwide	Tel: 81(0)78-435-2800 Fax: 81(0)78-435-2805 http://www.rockfield.co.jp/	15-2 Uozakihama-cho, Higashinada-ku, Kobe 658-0024

Sources: Nikkei Marketing Journal “Food Service Ranking 2008” (May 13, 2009), and company annual reports. Sales are shown by consolidated base.

Appendix C. Japanese Food Manufacturers by Product Category

Table C-1 Frozen Foods		
Company Name	Share %	Main Product
Nichirei	20.2	Fried Rice and Vegetables
JT Group	16.7	Tobacco, seasonings, cooking oils, home use products
Maruha Nichiro Holdings	15.0	Fried Shrimp, frozen noodles
Ajinomoto Frozen Foods	11.7	Fisheries products, processed foods
Nippon Suisan Kaisha	7.9	Seafood

Table C-2 Ham & Sausage		
Company Name	Share %	Main Products
Nippon Meat Packers	21.0	Meat
Itoham Foods	18.1	Ham, Sausages
Marudai Food	17.0	Ham, Sausages & Meat
Prima Meat Packers	9.9	Meat
Yonekyu	8.2	Meat Products

Table C-3 Ice cream		
Company Name	Share %	Main Products
Lotte	17.1	Ice cream, snack
Morinaga	13.1	Milk, Yogurt
Ezaki Glico	12.1	Ice cream, snack
Meiji Dairies Corp	10.8	Milk, Yogurt
Haagen-daz	10.6	Ice cream

Table C-4 Pasta		
Company Name	Share %	Main Product
Nisshin Foods	31.2	Flour, microwave pasta
Nippon Flour Mills	25.7	Flour
Showa Sangyo	7.1	Instant Noodles
Hagoromo Foods	7.1	Instant Noodles

(Sources: "Market Share 2009" published by Nikkei Sangyo Shimbun Publishing)

Table C-5 Instant Noodle		
Company Name	Share %	Main Product
Nissin Food Products	39.3	Flour
Toyo Suisan	20.4	Seafood
Sanyo Foods	12.8	Instant Noodles
Myojo Foods	9.6	Instant Noodles
Acecook	7.4	Instant Noodles

Table C-6 Beer		
Company Name	Share %	Main Product
Asahi Breweries	37.8	Beer
Kirin Breweries	37.2	Beer
Suntory	12.4	Spirits, Wine, Beer
Sapporo Breweries	11.8	Beer
Orion Breweries	0.8	Shochu

Table C-7 Soft Drinks		
Company Name	Share %	Main Product
Coca-Cola	29.4	Non-alcoholic drinks
Suntory	20.3	Non-alcoholic drinks

Kirin Beverage	11.1	Non-alcoholic drinks
Ito En	9.2	Green Tea
Asahi Soft Drinks	8.3	Green Tea

Table C-8 Tonic Drinks/Over-the-Counter Preparations		
Company Name	Share %	Main Product
Taisho Pharmaceutical	40.8	Tonic drinks
Sato Pharmaceutical	11.3	Health drinks
Taiho Pharmaceutical	7.9	Amino acid products
Takeda Pharmaceutical	6.9	Tonic drinks
SSP	5.8	Tonic Drinks

Appendix C Sources: Nihon Sangyo Shimbun,. “Domestic Share Survey 2008” (July 28, 2009) except Table C-4

Appendix D. Key Contacts

Table D-1: U.S. Government

Organization Name	Telephone/Fax URL/E-mail	Address
Agricultural Trade Office American Embassy, Tokyo	Tel: 81(0)3-3224-5115 Fax: 81(0)3-3582-6429 www.usdajapan.org atotokyo@fas.usda.gov	1-10-5 Akasaka Minato-ku, Tokyo 107-8420
Agricultural Trade Office American Consulate-General, Osaka	Tel: 81(0)6-6315-5904 Fax: 81(0)6-6315-5906 www.usdajapan.org atoosaka@fas.usda.gov	2-11-5 Nishi-Tenma Osaka 530-8543
Agricultural Affairs Office, American Embassy, Tokyo	Tel: 81(0)3-3224-5105 Fax: 81(0)3-3589-0793 agtokyo@fas.usda.gov	1-10-5 Akasaka Minato-ku, Tokyo 107-8420
American Embassy Tokyo, Japan	Tel: 81(0)3-3224-5000 Fax: 81(0)3-3505-1862 http://tokyo.usembassy.gov/	1-10-5 Akasaka Minato-ku, Tokyo 107-8420
Animal and Plant Health Inspection Service (APHIS)	Tel: 81(0)3-3224-5110 Fax: 81(0)3-3224-5291 www.aphis.usda.gov	1-10-5 Akasaka, Minato-ku, Tokyo 107-8420
FAS Washington	www.fas.usda.gov	1400 Independence Ave., SW

		Washington, DC 20250
USDA Washington	www.usda.gov	1400 Independence Ave., SW Washington, DC 20250

Table D-2: U.S. State Government Offices in Japan

Organization Name	Telephone/Fax URL	Address
Alabama	Tel: 81(0)3-3655-3508 Fax: 81(0)3-5232-3850 www.ado.state.al.us	Minami Aoyama Bldg. 5F, 1-10-2 Minami Aoyama Minato-ku, Tokyo 107-0062
Alaska	Tel: 81(0)3-3556-9621 Fax: 03-3556-9623 www.alaska.or.jp	Room 307 Central Bldg. 22-1, Ichibancho Chiyoda-ku, Tokyo 102-0082
Arizona	Tel: 81(0)3-3492-8951 Fax: 81(0)3-3492-8951 www.arizonajapan.com	2-9-7-414, Nishi-Gotanda Shinagawa-ku, Tokyo 141-0031
Arkansas	Tel: 81(0)3-5447-7471 Fax: 81(0)3-5447-7472 www.arkansas-jp.org http://arkansasedc.com	AIOS Hiroo Bldg. 8F, 1-11-2 Hiroo Shibuya-ku, Tokyo 150-0012
Colorado	Tel: 81(0)3-5272-1041 Fax: 81(0)3-3207-6685 http://coloradojapan.org	2-3-26 Nishi-Waseda Shinjuku-ku, Tokyo 169-0051
Florida	Tel: 81(0)3-3230-0505 Fax: 81(0)3-5213-0507 www.eflorida.com	Sakamiya #2 Bldg. 5F, 10 Ichibancho Chiyoda-ku, Tokyo 102-0082
Georgia	Tel: 81(0)3-3539-1676 Fax: 81(0)3-3504-8233 www.global-georgia.org	2-7-16 Toranomom, Minato-ku, Tokyo 105-0001
Idaho	Tel: 81(0)7-8854-7270 Fax: 81(0)7-8854-7271 www.idahojapan.org	1521-3-602 Mikage Aza Shironomae, Mikage-cho Higashinada-ku, Kobe 658-0056
Illinois	Tel: 81(0)3-3268-8011 Fax: 81(0)3-3268-8700 www.commerce.state.il.us	2-1 Ichigaya, Ichigaya Sadoharacho Shinjuku-ku, Tokyo 162-0842
Indiana	Tel: 81(0)3-3234-3875 Fax: 81(0)3-3234-3886 www.in.gov/isda	Ichinose Bldg. 5F, 3-5-11, Koji-machi Chiyoda-ku, Tokyo 102-0083
Iowa	Tel: 81(0)3-3222-6901 Fax: 81(0)3-3222-6902 www.iowatokyo.com www.iowa.gov	Room 903 Central Bldg. 22-1 Ichibancho Chiyoda-ku, Tokyo 102-0082
Kansas	Tel: 81(0)3-3239-2844 Fax: 81(0)3-3239-2848 www.sunflower-state.com www.kansascommerce.com	Kioicho WITH Bldg 4F, 3-32 Kioicho Chiyoda-ku, Tokyo 102-0094
Kentucky	Tel: 81(0)3-3582-2334 Fax: 81(0)3-3588-1298 www.kentucky-net.com	2-5-8 Akasaka Minato-ku, Tokyo 107-0052
Mississippi	Tel: 81(0)45-222-2047 Fax: 81(0)45-222-2048 www.mississippi.org	Yokohama World Porters 6F, 2-2-1 Shinko Naka-ku, Yokohama 231-0001
Missouri	Tel: 81(0)3-3586-1496 Fax: 81(0)3-3586-1498	S-303, Ark Executive Tower, 1-14-5 Akasaka

	http://www.missouri-japan.org/office.html	Minato-ku, Tokyo 107-0052
Montana	Tel: 81(0)96-385-0782 Fax: 81(0)96-381-3343 http://agr.mt.gov www.bigskvjapan.com	6-18-1, Suizenji, Kumamoto 862-8570
North Carolina	Tel: 81(0)3-3435-9301 Fax: 81(0)3-3435-9303 www.nccommerce.com http://www.nctokyo.com/	Suzuki Bldg 5F, 3-20-4 Toranomom Minato-ku, Tokyo 105-0001
Ohio	Tel: 81(0)3-3499-2493 Fax: 81(0)3-3499-3109 http://ohio.gov/	Minami Aoyama First Bldg. 10F 7-8-1 Minami-Aoyama Minato-ku, Tokyo 107-0063
Oregon	Tel: 81(0)3-3580-8951 Fax: 81(0)3-3580-9071 http://oregon.gov www.oregonjapan.org	Shimbashi Hara Bldg. 3F, 2-10-5 Shimbashi Minato-ku, Tokyo 105-0004
Pennsylvania	Tel: 81(0)3-3505-5107 Fax: 81(0)3-5549-4127 www.pa-japan.org	KY Bldg 7F, 3-16-14, Roppongi Minato-ku, Tokyo 106-0032
Tennessee	Tel: 81(0)45-222-2042 Fax: 81(0)45-222-2043 www.state.tn.us http://www.tennesseejapan.com/	Yokohama World Porters 6F, 2-2-1 Shinko-cho Naka-ku, Yokohama 231-0001
Texas	Tel: 81(0)3-3400-1352 Fax: 81(0)3-3400-0570 www.state.tx.us	2-5-9 Hiroo Shibuya-ku, Tokyo 150-0012
Virginia	Tel: 81(0)3-5404-3424 Fax: 81(0)3-5404-3401 www.yesvirginia.org	Kamiyacho MT Bldg. 14F, 4-3-20 Tranomon Minato-ku, Tokyo 105-0001
Washington	Tel: 81(0)3-5305 5035 Fax: 81(0)3-5305-5036 www.trade.wa.gov	5F Shin Tokyo Kaikan, 1-34-6 Asagaya-minami Suginami-ku, Tokyo 166-0004
West Virginia	Tel: 81(0)52-953-9798 Fax: 81(0)52-953-9795 http://www.boc.state.wv.us/ http://www.westvirginia.or.jp/	3-24-17 Nishiki Naka-ku, Nagoya 460-0003

Table D-3: U.S. Trade Associations and Cooperator Groups in Japan

<i>Organization Name</i>	<i>Telephone/Fax URL</i>	<i>Address</i>
Alaska Seafood Marketing Institute	Tel: 81(0)3-3990-1767 Fax: 81(0)3-3990-4725 www.alaskaseafood.org	5-5-10-207, Tagara, Nerima-ku Tokyo, 179-0073
Almond Board of California	Tel: 81(0)3-4520-5848 Fax: 81(0)3-4520-5848 http://www.almondboard.com/	3-5-27 Roppongi, Minato-ku Tokyo 106-0032
American Forest & Paper Association	Tel: 81(0)3- 3568-7450 Fax: 81(0)3-3568-0720 http://www.americanwood.jp	No. 9 Kowa Building Annex 1F 1-6-7 Akasaka, Minato-ku, Tokyo 107-0052
American Hardwood Export Council	Tel: 81(0)6-6315-5101 Fax: 81(0)6-6315-5103 http://www.ahec-japan.org/	c/o American Consulate General 10F. 2-11-5, Nishitenma, Kita-ku, Osaka 530-8543

American Softwood Japan Office	Tel: 81(0)3-3568-7452 Fax: 81(0)3-3568-0720 http://www.softwood.org http://www.americansoftwoods.jp	No. 9 Kowa Building Annex 1F 1-6-7 Akasaka, Minato-ku, Tokyo 107-0052
American Soybean Association	Tel: 81(0)3-5563-1414 Fax: 81(0)3-5563-1415 http://www.asajapan.org/	KY Tameike Bldg., 4F 1-6-19 Akasaka Minato-ku, Tokyo 107-0052
Blue Diamond Growers	Tel: 81(0)3-5226-5601 Fax: 81(0)3-5226-5603 www.bluediamond.com	4-8-26 Kojimachi, Chiyoda-ku, Tokyo 102-0083
California Cherry Advisory Board	Tel: 81(0)467-81-3921 Fax: 81(0)-467-23-6987 www.calcherry.com	2-11-11 Komachi, Kamakura-shi, Kanagawa 248-0006
California Pistachio Export Council	Tel: 81(0)3-3403-8288 Fax: 81(0)3-3403-8289 www.pistachios.org	1-26-4-7C Minami Aoyama Minato-ku, Tokyo 107-0062
California Pomegranate Tokyo PR Office	Tel: 81(0)3-5269-2301 Fax: 81(0)3-5269-2305	Shinjukugyoenmae Annex 6F 4-34 Yotsuya Shinjuku-ku, Tokyo 160-0004
California Prune Board	Tel: 81(0)3-3584-0866 Fax: 81(0)3-3505-6353 www.californiadriedplums.org	Pacific Bldg.3F, 1-5-3 Higashiazabu Minato-ku, Tokyo 106-0044
California Strawberry Commission	Tel: 81(0)3-5770-7533 Fax: 81(0)3-5770-7534 www.calstrawberry.com	9-1-7-581 Akasaka, Minato-ku, Tokyo 107-0052
California Table Grape Commission	Tel: 81(0)3-3221-6410 Fax: 81(0)3-3221-5960 www.tablegrape.com	Seibunkan Bldg, 5F, 5-9, Iidabashi, 1-chome, Chiyoda-ku Tokyo, 102-0072
California Walnut Commission	Tel: 81(0)3-3505-6204 Fax: 81(0)3-3505-6353 www.walnuts.org http://www.californiakurumi.jp/	Pacific Bldg.3F, 1-5-3 Higashiazabu Minato-ku, Tokyo 106-0044
Cherry Marketing Institute	Tel: 81(0)3-5770-7533 Fax: 81(0)3-5770-7534 http://www.choosecherries.com/	9-1-7-581 Akasaka Minato-ku, Tokyo 107-0052
Cotton Promotion Institute, Japan	Tel: 81(0)6-6231-2665 Fax: 81(0)6-6231-4661 http://www.cotton.or.jp/	Mengyo Kaikan 5-8, Bingomachi 2-Chome, Chuo-ku, Osaka 541-0051
Cranberry Marketing Committee	Tel: 81(0)3-3403-8288 Fax: 81(0)3-3403-8289 www.uscranberries.com	1-26-4-7C Minami Aoyama, Minato-ku, Tokyo 107-0062
Dairy Export Council, U.S.	Tel: 81(0)3-3221-6410 Fax: 81(0)3-3221-5960 www.usdec.org	Seibunkan Bldg, 5F, 5-9, Iidabashi, 1-chome, Chiyoda-ku Tokyo, 102-0072

Florida Department of Citrus	Tel: 81(0)3-3584-7019 Fax: 81(0)3-3582-5076 www.floridajuice.com	Suite 310, 1-11-36 Akasaka Minato-ku, Tokyo 107-0052
Grains Council, U.S.	Tel: 81(0)3-3505-0601 Fax: 81(0)3-3505-0670 www.grains.org http://grainsjp.org/	KY Tameike Bldg., 4F, 1-6-19 Akasaka Minato-ku, Tokyo 107-0052
Hawaii Papaya Industry Association	Tel: 81(0)6-4560-6206 Fax: 81(0)6-4560-6039 http://www.hawaiipapaya.com/	Yodoyabashi Mitsui Bldg. 4-1-1 Imabashi, Chuo-ku, Osaka 541-0042
Meat Export Federation, U.S.	Tel: 81(0)3-3584-3911/2 Fax: 81(0)3-3587-0078 www.americanmeat.jp	KY Tameike Bldg., 5F, 1-6-19 Akasaka Minato-ku, Tokyo 107-0052
Napa Valley Vintners Japan Office	Tel: 090-4008-5858 Fax: 81(0)3-6276-5858 www.napavintners.com	2-6-11-2105 Shibaura, Minato-ku, Tokyo 108-0023
National Dry Bean Council	Tel: 81(0)3-3221-6410 Fax: 81(0)3-3221-5960 www.usdrybeans.com	Seibunkan Bldg. 5F, 1-5-9 Iidabashi Chiyoda-ku, Tokyo 102-0072
National Watermelon Promotion Board	Tel: 81(0)3-3584-7019 Fax: 81(0)3-3582-5076	1-11-36 Akasaka, Minato-ku Tokyo 107-0052
Northwest Cherry Growers	Tel: 81(0)3-5770-7533 Fax: 81(0)3-5770-7534 www.nwcherries.com	9-1-7-581 Akasaka, Minato-ku, Tokyo 107-0052 *Need ID to access info
Oregon Wine Board	Tel: 81(0)3-3266-9978 Fax: 81(0)3-3266-9299 http://oregonwine.org/	291-1-502 Yamabuki-cho Shinjuku-ku, Tokyo 162-0801
Pet Food Institute	Tel: 81(0)3-5789-5398 Fax: 81(0)3-5789-5399 www.petfoodinstitute.org	Yebisu Garden Place Tower, 18F, 4-20-3 Yebisu Shibuya-ku, Tokyo 150-6018
Potato Board, U.S.	Tel: 81(0)3-3505-5737 Fax: 81(0)3-3505-6353 www.potatoesusa-japan.com	Pacific Bldg. 3F, 1-5-3 Higashiazabu Minato-ku, Tokyo 106-0044
Poultry and Egg Export Council, USA	Tel: 81(0)3-3403-8288 Fax: 81(0)3-3403-8289 www.usapeec.org	1-26-4-7C Minami Aoyama, Minato-ku, Tokyo 107-0062
Raisin Administrative Committee	Tel: 81(0)3-3221-6410 Fax: 81(0)3-3221-5960 www.raisins-jp.org	Seibunkan Bldg. 5F, 1-5-9 Iidabashi Chiyoda-ku, Tokyo 102-0072
Rice Federation, USA	Tel: 81(0)3-3505-5752 Fax: 81(0)3-3505-6353 www.usarice.com http://www.usarice-jp.com/	Pacific Bldg. 3F, 1-5-3 Higashiazabu Minato-ku, Tokyo 106-0044
Sunkist Pacific Ltd.	Tel: 81(0)3-3523-0717	New River Tower, 8F, 1-6-11, Shinkawa, Chuo-ku,

	Fax: 81(0)3-3523-0710 www.sunkist.com	Tokyo 104-0033
Washington State Fruit Commission	Tel: 81(0)3-5770-7533 Fax: 81(0)3-5770-7534 http://www.nwcherries.com/index.html	9-1-7-581 Akasaka, Minato-ku, Tokyo 107-0052
Washington Wine Commission	Tel: 81(0)78-854-7270 Fax: 81(0)78- 854-7271 http://www.washingtonwine.org/	2-2-5-602 Mikage, Higashinada-ku, Kobe 658-0056
Western Growers Association	Tel: 81(0)3-5524-0300 Fax: 81(0)3-5524-1102 www.wga.com	Nihon Kochiku Bldg., 6F. 2-9-12 Kyobashi, Chuo-ku, Tokyo104-0031
Wheat Associates, U.S.	Tel: 81(0)3-3582-7911 Fax: 81(0)3-3582-7915 www.uswheat.org	NOF Tameike Bldg.5F, 1-1-14 Akasaka, Minato-ku, Tokyo 107-0052
Wine Institute of California	Tel: 81(0)3-3707-8960 Fax: 81(0)3-3707-8961 www.wineinstitute.org	2-24-6-403 Tamagawa Setagaya-ku, Tokyo 158-0094

Table D-4: U.S. Laboratories Approved by the Japanese Government*

Organization Name	Telephone/Fax URL	Address
California Export Laboratory Services, California Department of Food and Agriculture, Center for Analytical Chemistry	Tel: 916-262-1434 Fax: 916-262-1572 www.cdffa.ca.gov/is/cac/	3292 Meadowview Rd. Sacramento, CA 95832
Oregon Department of Agriculture, Export Service Center	Tel: 503-872-6630 Fax: 503-872-6615 http://oregon.gov/ODA/	1207 NW Naito Prkway #224 Portland, OR 97209-2851
ABC Research Corporation	Tel: 904-372-0436 Fax: 904-378-6483 www.abcr.com	3437 SW 24 th Ave. Gainesville, FL 32602
ACTS Testing Labs Bureau Veritas Group	Tel: 716-505-3300 Fax: 716-505-3301 http://www.hkexporter.net/inspection/in002.html	100 Northpoint Parkway Buffalo, NY 14228-1884
American Council for Food Safety & Quality / DFA of California		1855 South Van Ness Ave. Fresno, CA 93721
ANRESKO, Inc.	Tel: 415-822-1100 Fax: 415-822-6615 www.anresco.com	1370 Van Dyke Ave. San Francisco, CA 94124-3313
Bolin Laboratories, Inc.	Tel: 602-942-8220 Fax: 602-942-1050	17631 N. 25 th Ave. Phoenix, AZ 85023

Cargill Analytical Services Laboratory	Tel: 417-451-5973 Fax: 417-451-5478 www.cargill.com	Crowder Industrial Park, 4301 Doniphane Dr. Neosho, MO 64850
Certified Laboratories, Inc.	Tel: 516-576-1400 Fax: 516-576-1410 www.800certlab.com/	200 Express Street, Plainview, NY 11803
Certified Laboratories of California, Inc.		1156 N.Fountain Way #D, Anaheim, CA 92806
Columbia Food Laboratories, Inc.	Tel: 503-695-2287 Fax: 503-695-5187 www.columbiafoodlab.com	36740 E. Historic Columbia River Hwy. P.O. Box 353 Corbett, OR 97019
Covance Laboratory	Tel: 888-268-2623 Fax: 608-241-7227 www.covance.com/analytical	3301 kinsman Blvd. Madison, WI 53704
Eurofins Central Analytical Laboratories	Tel: 504-297-3400 Fax: 504-297-3410 www.centralanalytical.com	2315 N. Causeway Blvd., Suite 150 Metairie, LA 70001
Environmental Micro Analysis, Inc.		40 N. East St., Suite B Woodland, CA 95776
Food Products Laboratory, Inc. Bodycote Testing Group	Tel: 503-253-9136 Fax: 503-253-9019 http://www.bodycotetesting.com/home.aspx?lang=1	12003 NE Ainsworth Cir., Suite 105 Portland, OR 97220-1099
Irvine Analytical Laboratories, Inc.	Tel: 714-951-4425 Fax: 714-951-4909	10 Vanderbilt Dr. Irvine, CA 92618
Midwest Research Institute	Tel: 816-753-7600 Fax: 816-753-8420 www.mriresearch.org	425 Volker Blvd. Kansas City, MO 64110-2299
Michelson Laboratories	Tel: 562-928-0553 Fax: 562-927-6625 www.michelsonlab.com	6280 Chalet Dr. Commerce, CA 90040-3761
Mictobac Laboratories, Inc.	Tel: 412.459.1060 Fax: 866.515.4668 www.microbac.com	101 Bellevue Road, Suite 301 Pittsburgh, PA 15229-2132
NP Analytical Laboratories	Tel: 314-982-1310 Fax: 314-982-1078 http://www.npal.com/	Checkerboard Square St. Louis, MO 63164
The National Food Laboratory, Inc.	Tel: 925-828-1440 Fax: (925) 243-0117 www.thenfl.com	365 North Canyons Parkway Suite 201 Livermore, CA 94551

OMIC USA, Inc.	Tel: 503-223-1497 Fax: 503-223-9436 www.omicusa.com	3344 NW Industrial Street Portland, OR 97210-1619
Primus Laboratories	Tel: 805-922-0055 Fax: 805-922-2462 www.primuslabs.com	2810 Industrial Parkway Santa Maria, CA 93455
Silliker Laboratories of Illinois, Inc.	Tel: 708-957-7878 Fax: 708-957-8449 www.silliker.com	900 Maple Road, Homewood, IL 60430 USA
West Coast Food Center, Inc.	Tel: 503-254-5143 Fax: 503-254-1452	12423 NE Whitaker Way Portland, OR 97230

*Also found on MHLW's website: <http://www.mhlw.go.jp/topics/yunyu/5/dl/a3.pdf>

Table D-5: Japanese Government and Related Organizations

Organization Name	Telephone/Fax URL	Address
Ministry of Agriculture, Forestry and Fisheries (MAFF)	Tel: 81(0)3-3502-8111 www.maff.go.jp	1-2-1 Kasumigaseki Chiyoda-ku, Tokyo 100-8950
Ministry of Health, Labour and Welfare (MHLW)	Tel: 81(0)3-5253-1111 www.mhlw.go.jp	1-2-2 Kasumigaseki Chiyoda-ku, Tokyo 100-8916
Japan External Trade Organization (JETRO)	Tel:81(0)3-3582-5511 www.jetro.go.jp	Ark Mori Building, 6F 12-32, Akasaka 1-chome, Minato-ku, Tokyo 107-6006
Zen-noh (JA)	Tel: 81(0)3-6271-8111 www.zennoh.or.jp	1-3-1 Otemachi Chiyoda-ku, Tokyo 100-6832
JETRO Atlanta	Tel: 404-681-0600 Fax:404-681-0713 www.jetro.org/atlanta/	245 Peachtree Center Avenue NE, Marquis One Tower Suite 2208, Atlanta, GA30303
JETRO Chicago	Tel: 312-832-6000 Fax: 312-832-6066 www.jetro.org	One East Wacker Drive, Suite 600 Chicago, Illinois 60601
JETRO Houston	Tel: 713-759-9595 Fax: 713-759-9210 www.jetro.org	1221 McKinney Street, Suite 4141 Houston, TX 77010
JETRO Los Angeles	Tel: 213-624-8855 Fax: 213-629-8127 www.jetro.org	777 South Figueroa Street, Suite 2650 Loa Angeles, CA 90017
JETRO New York	Tel: 212-997-0400 Fax: 212-997-0464 www.jetro.org	1221 Avenue of the Americas McGraw Hill Bldg.42 nd Floor New York, NY 10020-1079

JETRO San Francisco	Tel:415-392-1333 Fax: 415-788-6927 www.jetro.org	201 Third St. Suite 1010 San Francisco CA 94103
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Table D-6: Japanese Associations - Food

Organization Name	Telephone/Fax URL	Address
All Japan Confectionery Assoc.	Tel: 81(0)3-3432-3871 Fax: 81(0)3-3432-4081 http://www.pcg.or.jp/english/index.html	1-16-10 Shiba Daimon Minato-ku, Tokyo 105-0012
Japan Federation of Dry Noodle Manufactures Assoc.	Tel: 81(0)3-3666-7900 Fax: 81(0)3-3669-7662 www.kanmen.com	15-6 Nihonbashi Kabutocho Chuo-ku, Tokyo 103-0026
Japan Pasta Assoc.	Tel: 81(0)3-3667-4245 Fax: 81(0)3-3667-4245 www.pasta.or.jp	15-6 Nihonbashi Kabutocho Chuo-ku, Tokyo 103-0026
All Nippon Spice Assoc.	Tel: 81(0)3-3237-9360 Fax: 81(0)3-3237-9360 www.ansa-spice.com	Sankyo Main Bldg. #505, 1-7-10 Iidabashi Chiyoda-ku, Tokyo 102-0072
Chocolate & Cocoa Assoc. of Japan	Tel: 81(0)3-5777-2035 Fax: 81(0)3-3432-8852 www.chocolate-cocoa.com	JB Bldg., 6-9-5 Shimbashi Minato-ku, Tokyo 105-0004
Japan Baking Industry Assoc.	Tel: 81(0)3-3667-1976 Fax: 81(0)3-3667-2049 www.fsic.co.jp/food/pan	Yaesu Kato Bldg. 5F, 15-12 Nihonbashi Kabutocho Chuo-ku, Tokyo 103-0026
Japan Bento Manufacturers Assoc.	Tel: 81(0)3-3356-1575 Fax: 81(0)3-3356-1817 www.bentou-shinkou.or.jp	Shinichi Bldg. 10F, 2-8 Yotsuya Shinjuku-ku, Tokyo 160-0004
Japan Cannery Assoc.	Tel: 81(0)3-3213-4751 Fax: 81(0)3-3211-1430 www.jca-can.or.jp	Yurakucho Denki Bldg, 1-7-1 Yurakucho Chiyoda-ku, Tokyo 100-0006
Japan Dairy Industry Assoc.	Tel: 81(0)3-3261-9161 Fax: 81(0)3-3261-9175 www.jdia.or.jp	1-14-19 Kudan Kita Chiyoda-ku, Tokyo 102-0073
Japan Dry Fruits Importers Assoc.	Tel: 81(0)3-3242-8316 Fax: 81(0)3-3242-8521	c/o Toyota Tsusho Corporation, Food Dept. Confectionary Ingredient Group, 3-8-1 Marunouchi, Chiyoda-ku, Tokyo 100-8320
Japan Freeze Dry Food Industry Assoc.	Tel: 81(0)3-3432-4664 Fax: 81(0)3-3459-4654	c/o Nihon Shokuryo Shimbun 1-9-9 Yaesu, Chuo-ku, Tokyo 103-0028

Japan Frozen Foods Assoc.	Tel: 81(0)3-3667-6671 Fax: 81(0)3-3669-2117 www.reishokukyo.or.jp	10-6 Nihonbashi-Kobunacho Chuo-ku, Tokyo 103-0024
Japan Grain Importers Assoc.	Tel: 81(0)3-3431-3895 Fax: 81(0)3-3431-3882	2-39-8, Nishishinbashi Minato-ku, Tokyo 105-0003
Japan Ham & Sausage Processors Assoc.	Tel: 81(0)3-3444-1211 Fax: 81(0)3-3441-8287 http://group.lin.go.jp/hamukumi/	1-5-6 Ebisu Shibuya-ku, Tokyo 150-0013
Japan Health Food and Nutrition Assoc.	Tel: 81(0)3-3268-3134 Fax: 81(0)3-3268-3136 http://www.jhnfa.org/	2-7-27 Ichigaya Sadoharacho Shinjuku-ku, Tokyo 162-0842
Japan Honey Assoc.	Tel: 81(0)3-3297-5645 Fax: 81(0)3-3297-5646 http://bee.lin.go.jp/	Bajichikusan Kaikan, 2-6-16-Shinkawa, Chuo-ku Tokyo 104-0033
Japan Ice Cream Assoc.	Tel: 81(0)3-3264-3104 Fax: 81(0)3-3230-1354 www.icecream.or.jp	1-14-19 Kudan Kita Chiyoda-ku, Tokyo 102-0073
Japan Fish Traders Assoc.	Tel: 81(0)3-5280-2891 Fax: 81(0)3-5280-2892 www.jfta-or.jp	1-23 Kanda-Nishikicho, Chiyoda-ku, Tokyo 101-0054 *Need Password
Japan Meal Replacement Assoc.	Tel: 81(0)3-3263-0957 Fax: 81(0)3-3263-1325 www.souzai.or.jp	Kojimachi Annex 6F, 4-5-10 Kojimachi Chiyoda-ku, Tokyo 102-0083
Japan Meat Traders Assoc.	Tel: 81(0)3-3588-1665 Fax: 81(0)3-3588-0013	Daini Watanabe Bldg., 1-7-3 Higashi Azabu Minato-ku, Tokyo 106-0044
Japan Nut Association	Tel Tel: 81-(0)3-5649-8572 Fax: 81(0)3-6662-6528 http://www.jna-nut.com/	Kohinata Bldg. #203, 2-18-10 Shinkawa Chuo-ku Tokyo 104-0033
Japan Peanuts Assoc.	Tel: 81(0)3-3584-7311 http://www.peanuts-jp.com/	1-9-13, Akasaka Minatoku, Tokyo 107-0052
Japan Poultry Assoc./Japan Egg Producers Assoc.	Tel: 81(0)3-3297-5515 Fax: 81(0)3-3297-5519 http://www.jpa.or.jp/	Bajichikusan-kaikan, 2-6-16 Shinkawa Chuo-ku, Tokyo 104-0033
Japan Processed Tomato Industry Assoc.	Tel: 81(0)3-3639-9666 Fax: 81(0)3-3639-9669 www.japan-tomato.or.jp	15-18 Nihonbashi- Kodenmacho Chuo-ku, Tokyo 103-0001

Japan Snack Cereal Foods Assoc.	Tel: 81(0)3-3562-6090 Fax: 81(0)3-3561-6539 http://jasca.jp/	2-11-11 Hoei Bld 5F, Kyobashi, Chuo-ku, Tokyo 104-0031
Japan Sauce Industry Assoc.	Tel: 81(0)3-3639-9667 Fax: 81(0)3-3639-9669 www.nippon-sauce.or.jp	15-18 Nihonbashi- Kodenmacho Chuo-ku, Tokyo 103-0001 * Need ID
Japan Soba Noodle Assoc.	Tel: 81(0)3-3264-3801 Fax: 81(0)3-3264-3802 http://www.nihon-soba-kyoukai.or.jp/	2-4 Kanda Jinbocho Chiyoda-ku, Tokyo 101-8420
Japan Swine Association	Tel: 81(0)3-3370-5473 Fax: 81(0)3-3370-7937 http://pig.lin.go.jp/	1-37-20, Yoyogi Shibuya-ku, Tokyo 151-0053

Table D-7: Japanese Associations - Beverages

Organization Name	Telephone/Fax URL	Address
All Japan Coffee Assoc.	Tel: 81(0)3-5649-8377 Fax: 81(0)3-5649-8388 http://coffee.ajca.or.jp	Max Bldg., 6-2 Nihonbashi Hakozaicho Chuo-ku, Tokyo 103-0015
Brewers Association of Japan	Tel: 81(0)3-3561-8386 Fax: 81(0)3-3561-8380 www.brewers.or.jp	Showa Bldg., 2-8-18 Kyobashi Chuo-ku, Tokyo 104-0031
The Mineral Water Assoc. of Japan	Tel: 81(0)3-3350-9100 Fax: 81(0)3-3350-7960 www.minekyo.jp	Shinjuku Mura Bldg 4F, 1-28-4, Shinjuku Shinjuku-ku, Tokyo 160-0022
Japan Soft Drinks Assoc.	Tel: 81(0)3-3270-7300 Fax: 81(0)3-3270-7306 www.j-sda.or.jp	3-3-3 Nihonbashi- Muromachi Chuo-ku, Tokyo 103-0022
Japan Spirits & Liquors Makers Assoc.	Tel: 81(0)3-6202-5728 Fax: 81(0)3-6202-5738 http://www.yoshu.or.jp/	2-12-7, Nihonbashi Chuo-ku, Tokyo 103-0025
Japan Wines & Spirits Importers Assoc.	Tel: 81(0)3-3503-6505 Fax: 81(0)3-3503-6504 http://www.youshu-yunyu.org/	1-13-5 Toranomom Minato-ku, Tokyo 105-0001
Japan Wineries Assoc.	Tel: 81(0)3-6202-5728 Fax: 81(0)3-6202-5738 http://www.winery.or.jp/	Takeda Shinedobashi Bldg 2F, 2-12-7 Nihonbashi Chuo-ku, Tokyo 103-0027

Table D-8: Japanese Associations - Distribution

Organization Name	Telephone/Fax URL	Address
National Assoc. of Supermarkets	Tel: 81(0)3-3207-3157 Fax: 81(0)3-3207-5277 www.super.or.jp	Okubo Fuji Bldg., 2-7-1 Okubo Shinjuku-ku, Tokyo 169-0072
Japan Chain Store Assoc.	Tel: 81(0)3-5251-4600 Fax: 81(0)3-5251-4601 www.jcsa.gr.jp	1-21-17 Toranomom Minato-ku, Tokyo 105-0001
Japan Department Store Assoc.	Tel: 81(0)3-3272-1666 Fax: 81(0)3-3281-0381	Yanagiya Bldg. 7F, 2-1-10 Nihonbashi Chuo-ku, Tokyo 103-0027

	www.depart.or.jp	
Japan Food Service Assoc.	Tel: 81(0)3-5403-1060 Fax: 81(0)3-5403-1065 www.jfnet.or.jp	1-29-6 Hamamatsucho Minato-ku, Tokyo 105-0013
Japan Food Service Wholesalers Assoc.	Tel: 81(0)3-5296-7723 Fax: 81(0)3-3258-6367 www.gaishokukyo.or.jp	2-16-18 Uchikanda Chiyoda-ku, Tokyo 101-0047
Japan Franchise Assoc.	Tel: 81(0)3-5777-8701 Fax: 81(0)3-5777-8711 http://jfa.jfa-fc.or.jp/	Daini Akiyama Bldg., 3-6-2 Toranomom Minato-ku, Tokyo 105-0001
Japan Hotel Assoc.	Tel: 81(0)3-3279-2706 Fax: 81(0)3-3274-5375 www.j-hotel.or.jp	Shin Otemachi Bldg., 2-2-1 Otemachi Chiyoda-ku, Tokyo 100-0004
Japan Medical Food Service Assoc.	Tel: 81(0)3-5298-4161 Fax: 81(0)3-5298-4162 www.j-mk.or.jp	Forte Kanda. 5F, 1-6-17 Kajicho Chiyoda-ku, Tokyo 101-0044
Japan Processed Foods Wholesalers Assoc.	Tel: 81(0)3-3241-6568 Fax: 81(0)3-3241-1469 http://homepage3.nifty.com/nsk-nhk/	Edo Bldg., 4F, 2-5-11 Nihonbashi- Muromachi Chuo-ku, Tokyo 102-0022
Japan Restaurant Assoc.	Tel: 81(0)3-5651-5601 Fax: 81(0)3-5651-5602 www.joy.ne.jp/restaurant	BM Kabuto Bldg., 11-7 Nihonbashi Kabuto-cho Chuo-ku, Tokyo 103-0026
Japan Retailers Assoc.	Tel: 81(0)3-3283-7920 Fax: 81(0)3-3215-7698 www.japan-retail.or.jp	3-2-2 Marunouchi Chiyoda-ku, Tokyo 100-0005
Japan Self-Service Assoc.	Tel: 81(0)3-3255-4825 Fax: 81(0)3255-4826 http://www.jssa.or.jp/	Sakurai bldg. 3-19-8, Uchikanda, Chiyoda-ku Tokyo, 101-0047

Sector Reports and Further Information

The following homepages and reports can provide useful information to interested exporters.

- *Agricultural Trade Office's homepages*
<http://www.usdajapan.org> (English)
<http://us-ato.jp> (English/Japanese)
<http://myfood.jp> (English/Japanese)
- *HRI Food Service Sector Report*
A guide to Japan's nearly \$234 billion Food service market.
<http://www.fas.usda.gov/gainfiles/200903/146327420.pdf>
- *Retail Sector Report*
<http://www.fas.usda.gov/gainfiles/200811/146306425.pdf>
- *Food Processing Sector Report*
A detailed look at Japan's food processing sector, identifying key trends and leading Japanese manufacturers.
<http://www.fas.usda.gov/gainfiles/200703/146280587.pdf>

- *Food and Agricultural Import Regulations and Standards (FAIRS) Report*

The FAIRS report is a comprehensive guide to Japan's food and beverage regulations, standards and requirements for importation. At the URL, <http://gain.fas.usda.gov/Pages/Default.aspx>, set your search to select Country: Japan, and Subject Text: FAIRS.

- *Japan Food Trends*

At the URL, <http://www.fas.usda.gov/scriptsw/AttacheRep/default.asp> or <http://gain.fas.usda.gov/Pages/Default.aspx>, set your search to select Country: Japan, and Subject Text: Japan Food Trends.

- *Red Meat Export Requirements for Japan*

USDA Food Safety and Inspection Service (FSIS) summary of red meat export requirements for Japan.
http://www.fsis.usda.gov/Regulations_&Policies/Japan_Requirements/index.asp

- *The National Organic Program - Export Arrangement with Japan*

USDA Agricultural Marketing Service useful information on National Organic Program and Export arrangement with Japan. Product & Market Briefs

<http://www.ams.usda.gov/nop/NOP/TradeIssues/Japan.html>

- *Japan External Trade Organization (JETRO) Reports*

An excellent source for links to other government websites, food sector reports and English translations for the Government of Japan's documents.

<http://www.jetro.go.jp/>

Most relevant documents are at:

<http://www.jetro.go.jp/en/market/regulations/index.html>

Other FAS Japan Reports and other information

Other Japan-specific reports are available on the USDA Foreign Agricultural Service Website.

<http://www.fas.usda.gov/scriptsw/attacherep/default.asp>

<http://gain.fas.usda.gov/Pages/Default.aspx>,