KARADENİZ İHRACATÇI BİRLİKLERİ
GENEL SEKRETERLİĞİ

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Konu : Japonya Pazar Araştırma Raporu (Hububat, Bakliyat, Yağlı Tohumlar ve Mamulleri Sektörü)

E-POSTA

KARADENİZ HUBUBAT BAKLİYAT YAĞLI TOHUMLAR VE MAMULLERİ İHRACATÇILARI BİRLİĞİ ÜYELERİNE SİRKÜLER
2025/066

Sayın üyemiz,

Orta Anadolu İhracatçı Birlikleri Genel Sekreterliğinden alınan 03/02/2025 tarih 27-1086 sayılı yazısı ekinde alınan ve Hububat Bakliyat Yağlı Tohumlar ve Mamulleri Sektör Kurulu tarafından alınan karar çerçevesinde Orta Anadolu Hububat Bakliyat Yağlı Tohumlar ve Mamulleri İhracatçıları Birliği koordinasyonunda, Sektör Kurulunda yer alan Birliklerin katılımı ile Japonya'da yerleşik Yano Araştırma Merkezi'ne önemli ihracat ürünlerimizi içerecek şekilde hazırlatılan "Japonya Pazar Araştırma Raporu" ile "Yönetici Özeti" ilişik bulunmaktadır.

Bilgilerinize sunarız.

e-imzalıdır
Sertaç Ş. TORAMANOĞLU
Genel Sekreter

EKLER:
Ek-I: Japonya Pazar Araştırma Raporu (285 sayfa)
Ek-II: Yönetici Özeti (18 sayfa)

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Prepared For:

Central Anatolian Cereals, Pulses, Oil Seeds and Products Exporters' Associations (OAIB)

Cereals, Pulses, Oil Seeds and Products Exporters Union- Market Research Project to Japan

November 29, 2024

株式会社 矢野経済研究所
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Preface

Project Objectives

The project aims to support the members of Cereals, Pulses, Oil Seeds and Products Exporters' Associations for promoting exports to Japan, by providing marketing information on the target items in Japan and practical guidance on exporting products to Japan.

Target Items

Items	CN Codes
1. Protein, supplement	2106
2. Chocolate	1806
3. Biscuits	1905
4. Pasta	1902
5. Sauces, mustard	2103
6. Dried beans	0713
7. Vegetable oil, Margarine	1512, 1515, 1517
8. Sugar confectionery	1704
9. Corn flakes, Cereals	1104
10. Soup, concentrated broth	2104
11. Bulgur and Cooked Bulgur Pilaf	1904.30, 1904.90
12. Pet food	2308, 2309

Report on The Foods Market in Japan

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Research Methodologies

- Utilization and reanalysis of original in-house data of YANO
- Collection and analysis of public statistics
- Collection and analysis of other publicly available data
- Telephone interviews with relevant authorities and agencies as well as with key businesses in the foods industry

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I. Structure of Food Products Distribution

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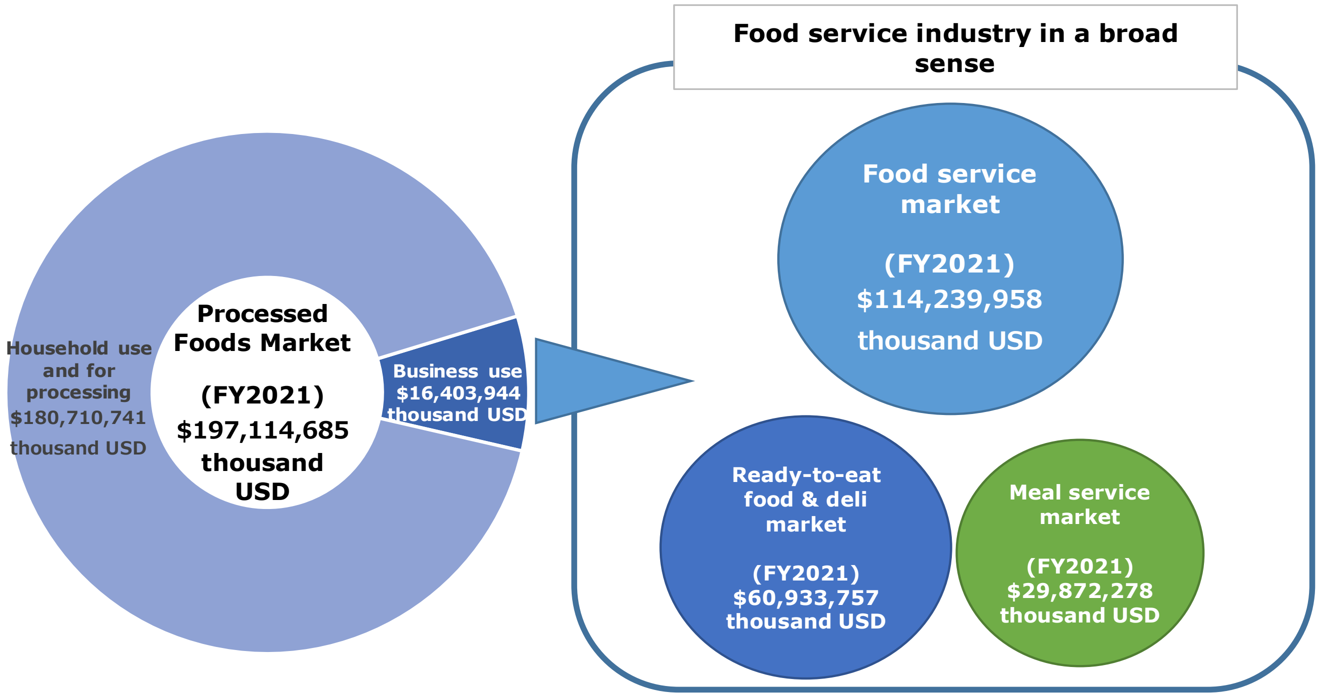
Processed foods market size by application & Business-use foods supplier market size

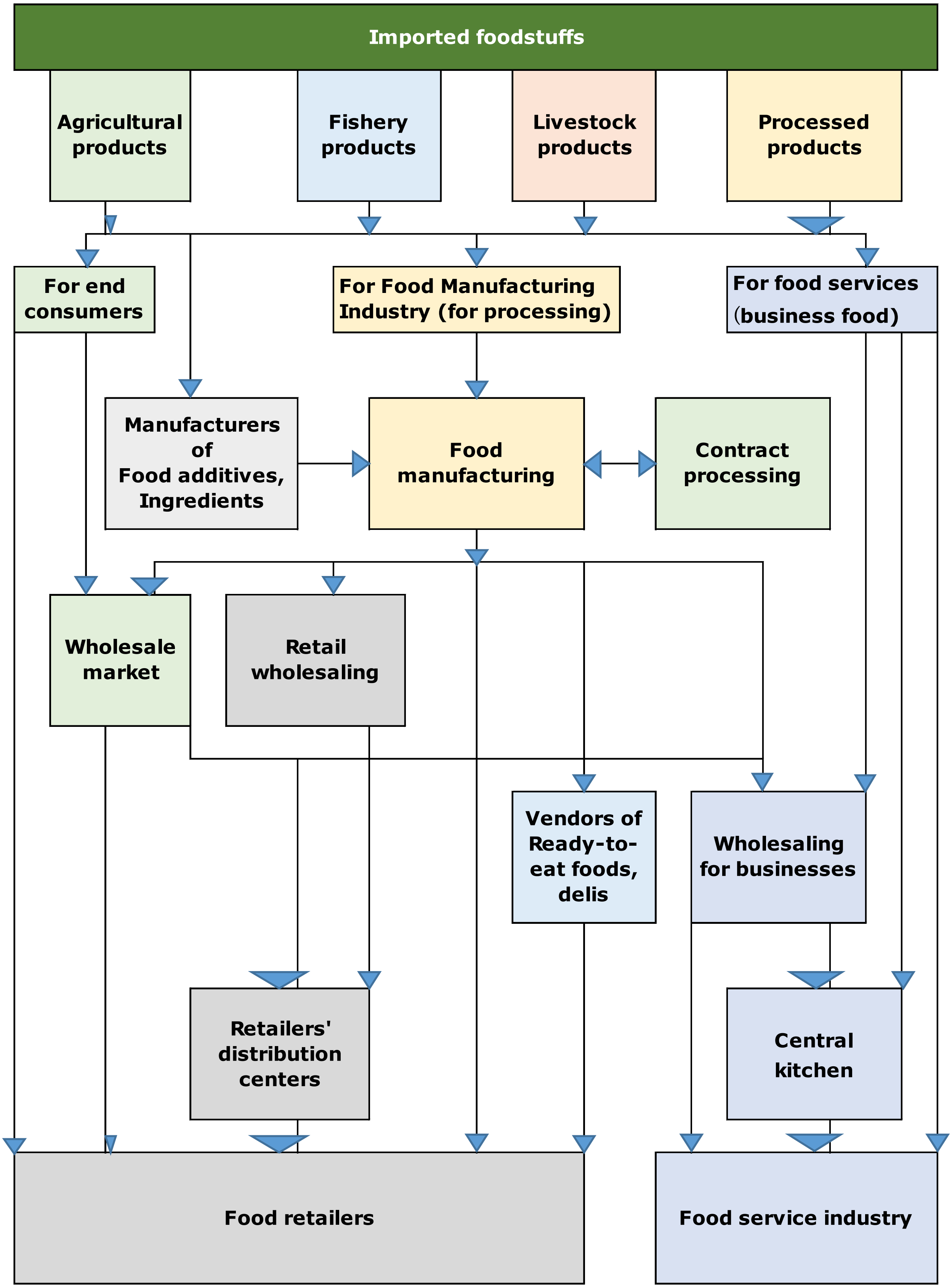


Estimated by Yano Research Institute

Main applications of processed foods

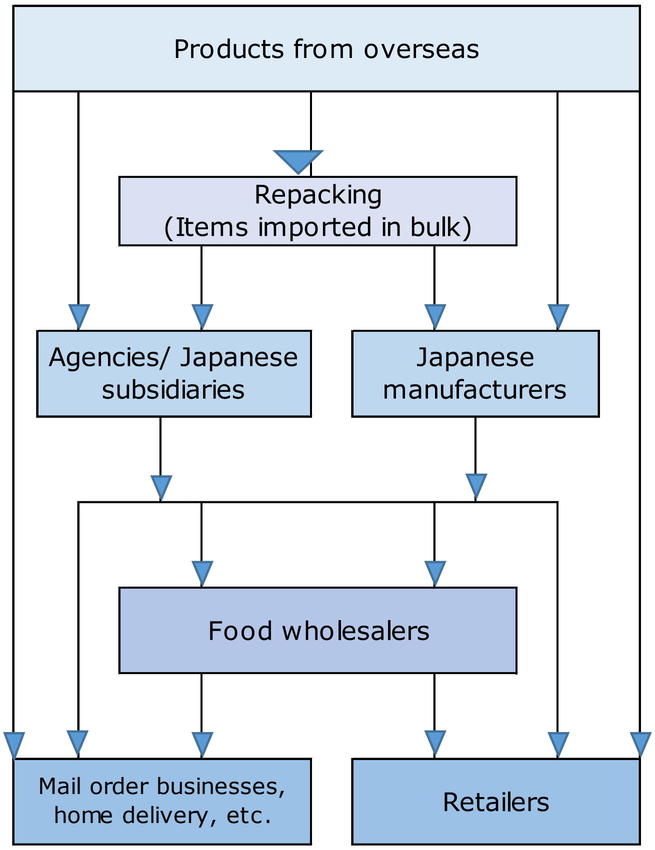
Household use	・ Food products standardized for eating and drinking in typical households ・ The largest market for processed foods in Japan
Business-use	・ Food products designed for use by restaurants and other businesses ・ Tends to be large in volume and low in price. Purchased also by general consumers ・ With serious manpower shortage in food service industry, the mainstay user, demand is high, proven by readily prepared ingredients and cooked ingredients having widespread in the industry
For Processing	・ Food ingredients are used ・ Food self-sufficiency rate in Japan is 38% by calory. The country depends on importation of many ingredients and foods, from agricultural, fishery, to livestock products ・ Affected by global abnormal weathers and disasters, food manufacturers in Japan face unstable procurement and soaring ingredient prices. The challenge is to stabilize the procurement by diversification of suppliers

Distribution Flow of Imported Foods in Japan



Distribution Structure of Foods Market for Household Use

Major distribution flow of imported household-use processed foods (end-user products)



Main players/processes involved in distribution of home-use imported processed foods

Repacking	・ In some cases, processed foods are transported in bulk (without individual packaging) and packaged overseas or in Japan to comply with Japanese laws on food labeling and packaging to meet Japanese food preferences
Agency, Japanese subsidiary	・ There are some cases of companies from overseas signing an agency contract with Japanese businesses or establishing a Japanese subsidiary, to facilitate import management and marketing activities
Domestic manufacturer	・ Some Japanese food manufacturers contract with foreign brands to be the importer and distributor to sell the products in Japan
Food wholesaler	・ Food wholesalers facilitate Japanese retailers and mail order businesses in conducting payment service (i.e., collects payments from retailers and pays domestic manufacturers), sales & delivery of products.
Mail order business	・ As ecommerce, there are shopping sites for overall products (Amazon, etc.,) websites dealing in specific products, manufacturer-owned sites, etc. ・ Aside from ecommerce, there are TV shopping programs, catalog sales, etc.
Retailer (shops)	・ Retailers selling food. A variety of business forms. Details are described below.

- **There are imported processed foods individually packaged or transported in bulk. The latter needs to be individually packed to meet Japanese standards.**
- **To import foods to Japan, it is needed to have an importer in Japan considering complicated importation procedures and product quality management. There are cases of manufacturers from overseas establishing a Japanese subsidiary or signing a contract with an importer. There also are some cases of Japanese food manufacturers entering into a contract for importing foreign brands to distribute the products in Japan or concluding a trademark license contract to manufacture the products in Japan.**
- **One of the effective methods to distribute products to retailers throughout Japan is to use food wholesalers. The deals of groceries and supermarkets, the largest sales channel for foods used by households in Japan, are in many cases conducted through food wholesalers.**
- **The business style recently expanding the market share in Japan is mail order business. The core of mail order business is ecommerce, where Amazon has been increasing its momentum in recent years. Shopping sites can either be in the form of the tenant of an online mall or directly operated by the site operator. In either case, merchandise can be purchased from a wholesaler.**
- **Another sales channel used for imported foods sales is TV shopping channels. Two big companies develop teleshopping, and both have the customer base of mid-to-old female group. Characterized as excelling in sales pitch, Shop Channel (operator: Jupiter Shop Channel Co., Ltd. https://www.shopch.jp/), the largest, sells imported food products such as chocolate and other confectionery, honey, and health foods.**

Major food retailers (at store)

Business form	Characteristics	Major store name (operating company)
Supermarket	· The retailer for foods and ingredients consumed at households in daily life. · Not many companies develop their stores nationwide, rather, there are major supermarkets in every locality. · Mainly sells foods familiar with Japanese people, and not very many products from overseas.	· AEON (AEON CO., LTD.) https://www.aeon.info/
Imported food store	· Deals in many imported foods · "KALDI COFFEE FARM", with its stores nationwide (499 stores in Japan as of August 2023), is in a state of monopoly.	· KALDI COFFEE FARM (CAMEL COFFEE Co., Ltd.) https://www.kaldi.co.jp/
Discount store	· There are two types: low-price supermarkets and retailers that sell extensive product lines from food to daily necessities. For the latter, "Don Quijote" is the sole strongest retailer.	· Don Quijote (Pan Pacific International Holdings Corporation) · https://www.donki.com/
Membership supermarket	· Retailers that allow store entering by paying membership fee. · In recent years, "COSTCO WHOLESALE" that sells products in bulk and at low prices is popular in Japan, increasing the number of stores. (35 stores as of 24 Aug. 2024)	· COSTCO WHOLESALE (Costco Wholesale Corporation) · https://www.costco.co.jp/
Upscale supermarket	· Sells high-grade foods · Sells major brand products from overseas as well as regular items. · Focuses on the development and sale of original products and proprietary imports.	· SEIJO ISHII（SEIJO ISHII CO., LTD.） · https://www.seijoishii.co.jp/
Organic foods and goods store	· Organic food supermarket · Sells extensive organic foods from products from overseas to those domestically produced · Many are developed on a small scale, but "Bio c' Bon" has approx. 20 stores centered in Tokyo.	· Bio c' Bon Japon Co., Ltd. · https://www.bio-c-bon.jp/
Department store	· From foods, clothing to jewelry, there are extensive items of luxury products sold. · While this business form overall suffers from sluggish sales, some department stores located in metropolitan areas including Tokyo are prospering. · Product assortments of foods are like those in high-grade supermarkets.	· Isetan (Isetan Mitsukoshi Holdings Ltd.) · https://www.imhds.co.jp/corporate/index.html
Convenience store	· Small retail stores, centered on those open 24 hours a day.	· Seven-Eleven (Seven & i Holdings Co., Ltd.) · https://www.sej.co.jp/

Business form	Characteristics	Major store name (operating company)
	・ Foods sold are chiefly bento, delis, and others that can be eaten right away. ・ Processed foods sold are mainly well-selling products, often domestically produced.	
Drugstore	・ Mainly sells drugs, cosmetics, and daily necessities. ・ Bolstering food sales especially at stores with a large floor size. Increasing numbers of stores strive to attract customers by offering a similar level of food assortments to supermarkets, with prices lower.	・ welcia (WELCIA YAKKYOKU CO., LTD.) ・ https://www.welcia-yakkyoku.co.jp/

II. Market Size and Composition of Food Industry

The processed food market is gradually on the rise. The keywords to sell foods used by general households are “ease of use” and “health”.

Processed food market size by product category (Unit: 1,000 USD)

*Figures for FY2023 are the projection, figures in FY2024 and beyond are the forecast.

Product Category	Fiscal year										CAGR
	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2018-2027
Alcohol Drinks/Liquors	232,149	230,362	212,097	205,810	214,082	215,406	213,752	210,443	209,119	207,903	-1.2%
Beverages	342,797	337,502	315,333	318,642	326,914	341,473	348,753	352,061	350,738	357,014	0.5%
Dairy products	57,443	57,041	56,619	56,349	57,369	57,844	58,924	59,753	60,557	61,382	0.7%
Processed Meat Products	42,188	42,898	43,911	43,071	43,777	43,652	43,711	43,776	43,743	43,734	0.4%
Processed Seafood Products	58,635	58,721	57,339	55,368	56,086	58,714	59,223	59,448	59,577	60,493	0.3%
Agricultural Products	68,994	69,208	74,749	73,920	73,244	74,552	75,586	76,566	77,680	78,831	1.5%
Breads and Noodles	165,199	166,646	164,832	164,339	168,687	176,197	176,882	178,280	179,185	181,936	1.1%
Wheat Flours and Wheat Products	6,742	6,855	7,724	7,153	7,002	6,972	7,001	7,047	7,069	7,086	0.6%
Condiments	81,690	81,511	83,301	81,022	81,390	82,763	82,693	82,850	82,779	83,133	0.2%
Oil/Fat Products	14,866	15,051	15,530	15,211	16,321	16,036	16,362	16,573	16,760	16,873	1.4%
Sugars/Sweeteners	19,881	19,389	19,027	19,716	21,905	22,539	23,283	23,532	23,635	24,091	2.2%
Frozen Foods	92,026	93,959	85,503	89,778	95,135	97,989	99,927	102,574	104,560	107,059	1.7%
Instant Foods, Retort Foods	38,564	39,517	41,420	41,537	42,172	43,527	44,623	45,595	46,401	47,524	2.3%
Confectionery	283,102	287,202	275,693	271,024	281,778	296,343	302,649	308,714	307,657	314,547	1.2%
Dietary Supplements	57,007	57,064	57,309	58,401	58,637	59,527	56,081	53,277	53,277	53,810	-0.6%
Others	468,437	467,635	466,833	457,573	461,802	467,323	497,140	522,316	546,192	569,693	2.2%
Processed Foods Market Size	2,029,721	2,030,563	1,977,221	1,958,915	2,006,302	2,060,856	2,106,590	2,142,806	2,168,930	2,215,108	1.0%

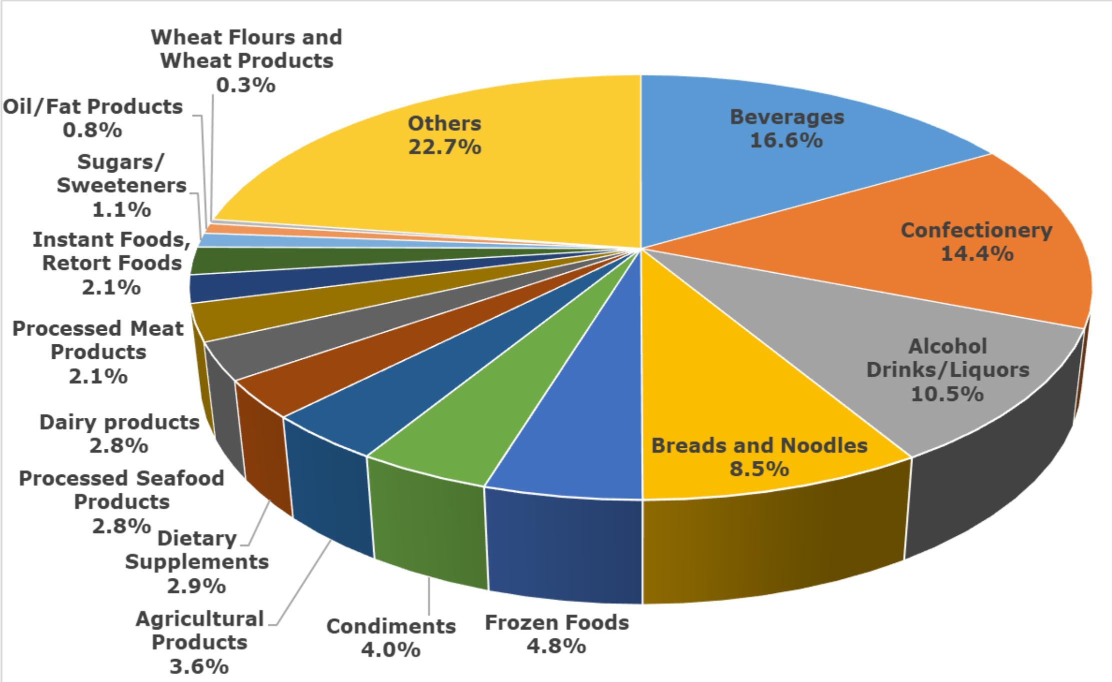
Processed food market size by product category compared to previous year (Unit: %)

Product Category	Fiscal year										Average
	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2018-2027
Alcohol Drinks/Liquors	98.5	99.2	92.1	97.0	104.0	100.6	99.2	98.5	99.4	99.4	98.8
Beverages	101.5	98.5	93.4	101.0	102.6	104.5	102.1	100.9	99.6	101.8	100.6
Dairy products	102.7	99.3	99.3	99.5	101.8	100.8	101.9	101.4	101.3	101.4	100.9
Processed Meat Products	96.3	101.7	102.4	98.1	101.6	99.7	100.1	100.1	99.9	100.0	100.0
Processed Seafood Products	100.3	100.1	97.6	96.6	101.3	104.7	100.9	100.4	100.2	101.5	100.4
Agricultural Products	107.4	100.3	108.0	98.9	99.1	101.8	101.4	101.3	101.5	101.5	102.1
Breads and Noodles	100.8	100.9	98.9	99.7	102.6	104.5	100.4	100.8	100.5	101.5	101.1
Wheat Flours and Wheat Products	97.0	101.7	112.7	92.6	97.9	99.6	100.4	100.7	100.3	100.2	100.3
Condiments	97.4	99.8	102.2	97.3	100.5	101.7	99.9	100.2	99.9	100.4	99.9
Oil/Fat Products	101.4	101.2	103.2	97.9	107.3	98.3	102.0	101.3	101.1	100.7	101.4
Sugars/Sweeteners	95.5	97.5	98.1	103.6	111.1	102.9	103.3	101.1	100.4	101.9	101.5
Frozen Foods	101.5	102.1	91.0	105.0	106.0	103.0	102.0	102.6	101.9	102.4	101.8
Instant Foods, Retort Foods	101.1	102.5	104.8	100.3	101.5	103.2	102.5	102.2	101.8	102.4	102.2
Confectionery	100.3	101.4	96.0	98.3	104.0	105.2	102.1	102.0	99.7	102.2	101.1
Dietary Supplements	101.9	100.1	100.4	101.9	100.4	101.5	94.2	95.0	100.0	101.0	99.7
Others	99.7	99.8	99.8	98.0	100.9	101.2	106.4	105.1	104.6	104.3	102.0
Processed Foods Market Size	100.3	100.0	97.4	99.1	102.4	102.7	102.2	101.7	101.2	102.0	100.9

* “Dietary Supplements” in the above refer to foods in the form of tablets, powder, capsules, or mini drinks that claim to promote health and beauty.

(Estimated by Yano Research Institute)

Composition of processed foods by product category (FY2023)



- **Although Japan faces waning population, which causes decline in eating volume as elderly population increases, the processed foods market is on the gradual rise.**

- **Among foods for household use that occupy a large share in the processed foods market, those that save cooking time and labor are raising demand, gradually boosting the processed foods market in the long-term view.**

- **The keywords of foods for household use that are in high demand are "ease of use" and "health".**

- **Demand for "ease of use" is backed by expansion of women's empowerment in the society and increase in single or elderly households. Well-selling foods are those that save time and labor for cooking. Owing to technological development by food manufacturers, foods that have attained both simple to cook and deliciousness show favorable sales. To be specific, frozen foods and delis, retort foods that only need to be microwaved, retort/freeze-dried foods that only need hot water, cooking sauces that simplifies seasoning just by adding to ingredients, and meal kits packed with pre-portioned and partially prepared food ingredients, are raising demand.**

- **Demand for "health" owes to expanding elderly population that has brought about high interests in "healthy life expectancy" that is to end the life while maintaining health, and the intention by mid-to-old population for anti-aging that is to be forever young. Among daily consumed foods, those that claims to promote health, fermented foods that traditionally have strong image of health among Japanese people, and naturally derived foods are in demand. Meanwhile, for dietary supplements, consumer sentiment has declined, because health hazards caused by a certain supplement are detected in March 2024, which is likely to shrink the market size between FY2024 and FY2025.**

II. Market Report on Target Items

1. Protein, Dietary Supplement

Key points of the market trend and characteristics

- **In Japan, demand for foods that bring about health and/or beauty is growing, because older people are highly conscious of active aging while middle-to-older people of anti-aging and aging care. Therefore, the dietary supplement market has been on the rise. However, the market is expected to shrink hereafter, as health hazards caused by a certain supplement are detected in March 2024, which has deteriorated consumer sentiment.**

- **Meanwhile, the protein market is brisk, backed by the recent training boom and demand for maintaining muscle strength by elderly people. However, as protein powders have low entry barriers, the market players face fierce competition in the market. As for drinks and bars, Japanese food manufacturers tend to occupy the market.**

- **Both supplements and protein products see expanding sales by overseas brands via ecommerce, increasingly receiving support from young customers.**

Types of Health/Beauty Foods on Market in Japan

Processed foods				
Food types		Supplements	General foods Processed foods including soft drinks, 、 condiments, confectionery, etc.	
		In the form of tablets, powder, capsules, mini drinks	Health functional ingredients added and enhanced	Natural foods
National systems	Foods with Functional Claims	○	○	○
	Foods for Specified Health Uses (FOSHU)	○	○	△
Other than above		○	○	○

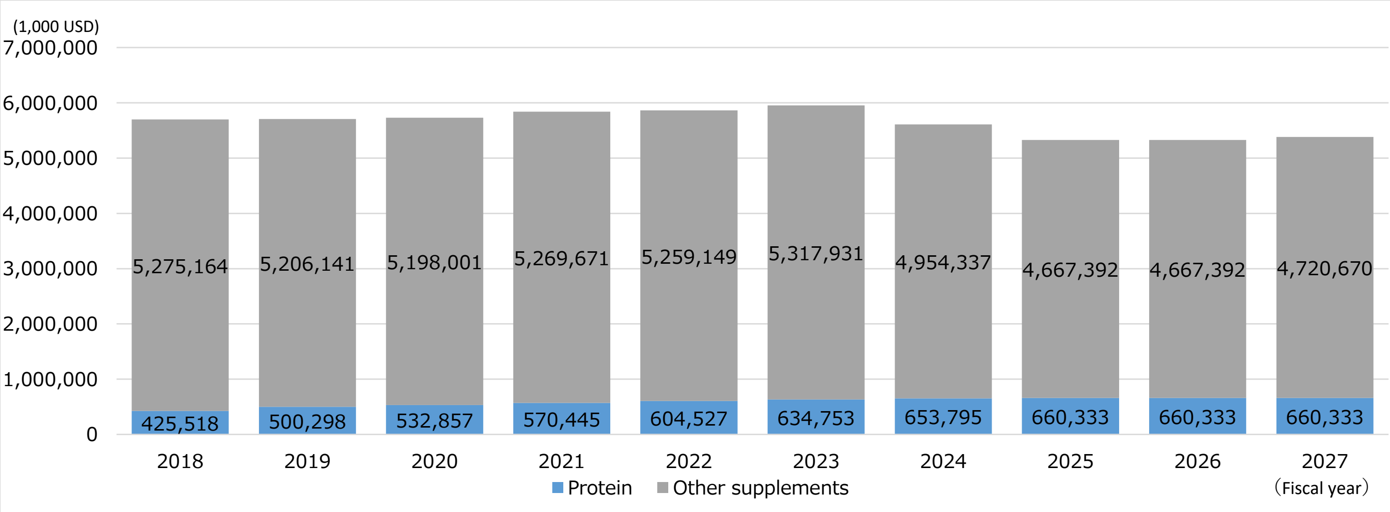
- Foods that claim to promote health and beauty in Japan are broadly divided into dietary supplements and general foods. There is no clear definition of supplements, but they are generally defined as food in the form of tablets, powder, capsules, or mini drinks.

- In Japan, only pharmaceuticals can be labeled with efficacy claims, while “Foods with Functional Claims” and “Food for Specified Health Uses (FOSHU)” are systematically allowed to label health functions in foods. Both are under the jurisdiction of the Consumer Affairs Agency, a Japanese government agency. Foods with Functional Claims is a food product that has been ‘accepted’ by the Consumer Affairs Agency, while FOSHU is a food product that has been ‘approved’ by the Agency, both after notifying the functional claims to the Agency, with the proof of it by attaching the clinical-based evidence to the notification document. There are almost no cases of direct notification by overseas operators, and the Japanese subsidiaries of overseas operators or Japanese sales agents are responsible for notification.

- Other than Foods with Functional Claims and FOSHU, there are a variety of processed foods that consumers expect for enhanced health or beauty. As expressing efficacy claims or health functions on foods is banned or strictly regulated in a legal basis, companies strive to send the message to consumers on the goodness in health or beauty expected from the food product to the extent not to violate the law.

Market Size

MARKET SIZE TRANSITION AND FORECAST (BY VALUE, FY2018 TO FY2027)



(1,000 USD)		2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	CAGR 2018-2027
		Fiscal year										
Dietary supplement total		5,700,682	5,706,439	5,730,858	5,840,116	5,863,675	5,952,683	5,608,132	5,327,726	5,327,726	5,381,003	-0.6%
	YoY	101.9	100.1	100.4	101.9	100.4	101.5	94.2	95.0	100.0	101.0	
Protein		425,518	500,298	532,857	570,445	604,527	634,753	653,795	660,333	660,333	660,333	5.0%
	YoY	105.2	117.6	106.5	107.1	106.0	105.0	103.0	101.0	100.0	102.0	
Other supplements		5,275,164	5,206,141	5,198,001	5,269,671	5,259,149	5,317,931	4,954,337	4,667,392	4,667,392	4,720,670	-1.2%
	YoY	100.4	98.7	99.8	101.4	99.8	101.1	93.2	94.2	100.0	99.5	

*Figure for FY2023 is the projection, and for FY2024 is the forecast.
(Estimated by Yano Research Institute)

- In Japan, the dietary supplement[1] market has been on a gradual uptrend until FY2023 owing to healthy longevity measures stemming from increasing elderly population and to higher anti-aging consciousness among senior citizens including middle aged people. However, health hazards caused by a certain supplement that in some cases led to death are detected in March 2024, deteriorating the consumer sentiment, which is likely to let the FY2024 market to shrink. With some time is needed for market recovery, it is projected to be FY2027 when the market upturns to a growth.

[1] Dietary supplements refer to foods in the form of tablets, powder, capsules, or mini drinks that claim to promote health and beauty.

- On the other hand, the protein market has increased users broadly, as posting of trained bodies on social media has become a boom which encouraged general young as well as middle-aged people to start muscle training, in addition to conventional heavy users such as sports professionals, body builders, and other intensive exercising population. The users have increased among older people as well, because of improved awareness of frailty[2] prevention measures which require muscle maintenance and augmentation, as well as intake of protein.

TOTAL IMPORT SIZE BY COUNTRY (HS CODE-BASED, FY2018 TO FY2023, VALUE & VOLUME)

《Import value transition》

FY2023	(1,000 USD)	Fiscal year						CAGR
Ranking	Country name	2018	2019	2020	2021	2022	2023	2018-2023
1	South Korea	155,185	115,916	113,079	145,173	158,685	139,965	-2.0%
2	United States	179,056	171,558	158,810	183,237	176,010	138,797	-5.0%
3	China	99,887	81,380	78,292	91,060	125,364	113,875	2.7%
4	Thailand	56,885	56,122	46,378	52,614	71,062	75,734	5.9%
5	Singapore	79,726	68,248	56,850	63,575	88,985	64,591	-4.1%
6	New Zealand	48,993	57,950	51,441	45,306	64,753	54,727	2.2%
7	Netherlands	36,047	33,519	30,269	29,753	39,434	41,231	2.7%
8	Germany	12,484	13,994	15,055	19,681	25,107	26,556	16.3%
9	Malaysia	15,375	17,283	10,409	18,713	22,447	23,314	8.7%
10	France	9,423	8,713	9,052	11,608	13,738	17,822	13.6%
31	Türkiye	814	1,006	533	681	1,140	1,184	7.8%
	Other	78,727	91,520	97,818	99,860	115,582	114,597	7.8%
	Total	772,602	717,206	667,985	761,263	902,306	812,392	1.0%
	YoY (%)	100.4	92.8	93.1	114.0	118.5	90.0	

*Cumulative total, from April to March
*Share of top 10 countries: 85.7% (2023)
*Import from Türkiye: $1,184 thousand USD, Share 0.1%, ranks 31th (2023)

[2] A concept proposed by the Japan Geriatrics Society in 2014, it is the Japanese translation of Frailty. It refers to a state of reduced physical functions because of weakened muscles and declined cognitive functions.

《Import volume transition》

FY2023 Ranking	(Unit: ton) Country name	Fiscal year 2018	2019	2020	2021	2022	2023	CAGR 2018-2023
1	South Korea	151,837	151,781	141,360	154,043	145,476	120,618	-4.5%
2	Thailand	87,498	89,522	80,782	80,054	86,205	80,990	-1.5%
3	China	47,881	41,202	39,947	39,344	41,994	40,524	-3.3%
4	Singapore	42,031	40,117	33,523	32,844	29,020	19,241	-14.5%
5	Malaysia	12,846	13,930	9,951	14,026	15,668	15,724	4.1%
6	New Zealand	21,210	18,747	17,649	14,930	15,498	13,633	-8.5%
7	Vietnam	1,268	4,463	9,141	10,129	12,144	11,416	55.2%
8	United States	10,079	9,602	8,441	9,685	9,796	7,278	-6.3%
9	Netherlands	7,279	7,855	7,450	6,832	6,686	6,367	-2.6%
10	Australia	5,311	7,091	5,606	4,917	2,383	2,112	-16.8%
30	Türkiye	137	176	85	104	119	119	-2.7%
	Other	20,096	21,065	18,148	16,985	17,837	16,796	-3.5%
	Total	407,473	405,552	372,084	383,892	382,825	334,820	-3.9%
	YoY (%)	101.1	99.5	91.7	103.2	99.7	87.5	

*Cumulative total, from April to March
*Share of top 10 countries: 94.9% (2023)
*Actual import from Türkiye: 119t, share 0.04%, ranks 30th (2023)

《Unit price transition》

	Fiscal year 2018	2019	2020	2021	2022	2023	CAGR 2018-2023
Unit price (US$/kg)	1.896	1.768	1.795	1.983	2.357	2.426	5.1%
Y-o-Y (%)	99.4	93.3	101.5	110.5	118.9	102.9	

- For HS code 2106, the largest importer for Japan both by value and volume is South Korea. It is because of widely distributed Panax ginseng (Korean ginseng) that needs to be imported. Panax ginseng is the representative exporting product for South Korea, and it has widely been distributed in Japan in the form of supplements that maintain or promote health.
- Whey protein, a protein ingredient, is almost exclusively imported, with the largest volume coming from the U.S., followed by New Zealand and Germany. Soy protein is mostly imported from China.

Key Information for Exporting to Japan

TARIFFS (HS CODE-BASED)

*General or Temporary rate shall be applied unless a specific tariff rate is shown in the tables below.

Statistical code		Description	Tariff rate						
H.S.code			Türkiye	General	Temporary	ASEAN	CPTPP	EU	US
21.06		Food preparations not elsewhere specified or included							
2106.10		Protein concentrates and textured protein substances							
		1 Preparations containing not less than 30 % of natural milk constituents by weight, calculated on the dry matter, excluding protein concentrates not less than 80 % of protein by weight, the largest ingredient is vegetable protein and put up in containers for retail sale by weight of less than 500 g each excluding container	35% + 1,359 yen/kg	35% + 1,359 yen/kg					
		For "the Pooled Quota of other milk products"							
	120	Preparation of vegetable protein	0.125		0.125		0.037	0.063	
	130	Other	0.25		0.25		0.075	0.125	
	140	Other	29.8% + 1,155 yen/kg				29.8% + 1,155 yen/kg		
		2 Other							
		1 Containing added sugar							
	211	A Less than 50% by weight of sucrose	0.168	0.28		0.168	0.061	0.061	0.061

Statistical code		Description	Tariff rate						
H.S.code			Türkiye	General	Temporary	ASEAN	CPTPP	EU	US
	219	B Other	0.077	0.35	0.077	0.21	0.076	0.076	
		2 Other							
		A Vegetable protein	0.125	0.125					
	221	Protein concentrates containing by weight not less than 80 % of protein, the largest single ingredient is vegetable protein and put up in containers for retail sale by weight of less than 500g each excluding container				Free	Free	Free	Free
	222	Other	0.106			Free	Free	Free	Free
	229	B Other	0.15	0.25		Free	Free	Free	Free
2106.90		Other							
		1 Preparations containing not less than 30 % of natural milk constituents by weight, calculated on the dry matter							
		1 Of a milkfat content, by weight, not exceeding 30%	35% + 799 yen/kg	35% + 799 yen/kg					
		For "the Pooled Quota of other milk products"							
	111	Base for nonalcoholic beverage, food supplement with a basis of vitamins and hydrolyzed vegetable protein	0.12		0.12		0.03	0.06	
	112	Other	0.21		0.21		0.052	0.105	0.052
	119	Other	29.8% + 679 yen/kg				29.8% + 679 yen/kg		
		2 Other	35% + 1,363 yen/kg	35% + 1,363 yen/kg					
		Prepared edible fats and oils, containing more than 30% and not more than 70% by weight of those of heading 04.05							

Statistical code		Description	Tariff rate						
H.S.code			Türkiye	General	Temporary	ASEAN	CPTPP	EU	US
		For the quantity quota stipulated by a Cabinet Order, on the basis of 18,977 ton for and in consideration of imported quantity in the preceding fiscal year AprilMarch, international market situation and other relevant conditions	25.0%						
	121	The place of origin, New Zealand	25%		25%		12.20%		
	122	Other	25%		25%		12.20%	12.30%	
	123	Other	29.8% +				29.8% +		
		For "the Pooled Quota of other milk products"							
	124	Base for nonalcoholic beverage, food supplement with a basis of vitamins and hydrolyzed vegetable protein	12%		12%		8.10%	8.20%	
	125	Other	21%		21%		14.30%	14.30%	
	129	Other	29.8% + 1,159 yen/kg				29.8% + 1,159 yen/kg		
		2 Other							
		1 Food preparations containing more than 30% by weight of one of those, rice, wheat including triticale or barley							
		A Containing more than 30% by weight of rice	402 yen/kg	402 yen/kg					

Statistical code		Description	Tariff rate						
H.S.code			Türkiye	General	Temporary	ASEAN	CPTPP	EU	US
	517	Imported by Japanese Government according to Article 30 of "The Law for Stabilization of SupplyDemand and Price of Staple Food", imported to be purchased and sold by Japanese Government in response to a joint application by seller to and purchaser from Japanese Government according to Article 31 of the law, imported with certification of Minister of Agriculture, Forestry and Fishery according to the Cabinet Order concerning rice and others provided by the Cabinet Order provided in column 3 of paragraph 1 of Article 34 of the law	25%		25%		For the tariff rate quota in Japan's Schedule to the WTO Agreement 25% Other Treatment for Australia Free		
	518	Other			49 yen/kg		49 yen/kg		
		B Other							
		a Containing more than 30% by weight of wheat including triticale	100 yen/kg	100 yen/kg					
	214	Imported by Japanese Government according to Article 42 of "The Law for Stabilization of SupplyDemand and Price of Staple Food", imported to be purchased and sold by Japanese Government in response to a joint application by seller to and purchaser from Japanese Government according to Article 43 of the law or imported with certification of Minister of Agriculture, Forestry and Fishery according to the Cabinet Order concerning wheat and others provided by the Cabinet Order provided in column 3 of paragraph 1 of Article 45 of the law	25%		25%		For the tariff rate quota in Japan's Schedule to the WTO Agreement 25% Other Free	Other than for the tariff rate quota in Japan's Schedule to the WTO Agreement Free	

Statistical code		Description	Tariff rate						
H.S.code			Türkiye	General	Temporary	ASEAN	CPTPP	EU	US
	215	Other	26.20 yen/kg		26.20 yen/kg		26.20 yen/kg		
		b Containing more than 30% by weight of barley	75 yen/kg	75 yen/kg					
	216	Imported by Japanese Government according to Article 42 of "The Law for Stabilization of SupplyDemand and Price of Staple Food", imported to be purchased and sold by Japanese Government in response to a joint application by seller to and purchaser from Japanese Government according to Article 43 of the law or imported with certification of Minister of Agriculture, Forestry and Fishery according to the Cabinet Order concerning wheat and others provided by the Cabinet Order provided in column 3 of paragraph 1 of Article 45 of the law	25%		25%		For the tariff rate quota in Japan's Schedule to the WTO Agreement 25% Other Free	Other than for the tariff rate quota in Japan's Schedule to the WTO Agreement Free	
	219	Other	26.60 yen/kg		26.60 yen/kg		26.60 yen/kg		
		2 Other							
		A Sugar syrup, containing added flavouring or colouring matter	35% or 27 yen/kg, whichever is the greater	35% or 27 yen/kg, whichever is the greater					
	221	Of sugar centrifugal	24.6% or 13.30 yen/kg, whichever is the greater		24.6% or 13.30 yen/kg, whichever is the greater		For the Pooled Quota Free Other than for the Pooled Quota 24.6% or 13.30 yen/kg, whichever is the greater	For the Pooled Quota Free	
	229	Other	29.8% or 23 yen/kg, whichever is the greater				10.8% or 8.36 yen/kg, whichever is the greater	10.8% or 8.36 yen/kg, whichever is the greater	10.8% or 8.36 yen/kg, whichever is the greater

Statistical code		Description	Tariff rate						
H.S.code			Türkiye	General	Temporary	ASEAN	CPTPP	EU	US
	230	B Chewing gum	5%	5%		5%	Free	Free	Free
	240	C Konnyaku	21.30%	25%		21.30%	18.10%	18.10%	
		D Compound alcoholic preparations of a kind used for the manufacture of beverages, of an alcoholic strength by volume of higher than 0.5% vol							
	246	a Preparations with a basis of fruit juices, of an alcoholic strength by volume of less than 1% vol	29.8% or 23 yen/kg, whichever is the greater	35% or 27 yen/kg, whichever is the greater		9.3% or 7.19 yen/kg, whichever is the greater, subject to a maximum customs duty of 50%	Free	Free	
	247	b Other	11%	12.80%		Free	Free	Free	Free
		E Other							
		a Containing added sugar							
		イ Bases for beverage, containing Panax Ginseng or its extract	28%	28%					
	252	Containing not less than 50% by weight of sucrose	1%		1%	28%	For the Pooled Quota Free Other than for the Pooled Quota 1%	For the Pooled Quota Free	
		Other							
	253	Foods, the largest single ingredient of which is sugar by weight	28%			28%	For the Pooled Quota Free Other than for the Pooled Quota 28%	For the Pooled Quota Free	

Statistical code		Description	Tariff rate						
H.S.code			Türkiye	General	Temporary	ASEAN	CPTPP	EU	US
	259	Other	23.80%			Free	Free	Free	
		☐ Food supplement with a basis of vitamins	12.50%	12.50%					
		Those, the largest single ingredient of which is sugar by weight							
	261	Containing lactose, milk protein or milkfat	12.50%			Free	Free	Free	
	262	Other	12.50%			Free	Free	Free	Free
	269	Other				Free	Free	Free	Free
		ハ Other							
		イ Less than 50% by weight of sucrose	28%	28%					
		Those, the largest single ingredient of which is sugar by weight							
	271	Containing lactose, milk protein or milkfat	28%			28%	For the Pooled Quota Free Other than for the Pooled Quota 28%	For the Pooled Quota Free	
	272	Other	25.50%			25.50%	For the Pooled Quota Free Other than for the Pooled Quota 25.5%	For the Pooled Quota Free	
	279	Other	23.80%			23.80%	For the Pooled Quota Free Other than for the Pooled Quota 23.8%	8.70%	
		▯ Other							
	281	I Put up in containers for retail sale, not more than 500g each including container	1%	30%	1%	29.80%	For the Pooled Quota Free Other than for the Pooled Quota 1%	For the Pooled Quota Free	

Statistical code		Description	Tariff rate						
H.S.code			Türkiye	General	Temporary	ASEAN	CPTPP	EU	US
	282	II Containing not less than 85 % by weight of sucrose excluding those put up in containers for retail sale, not more than 500 g each including container, those certified by a certification procedure stipulated by a Cabinet Order as imported to be repacked in containers for retail sale, not more than 500 g including container after importation with no change in ingredients, or those exceeding 257yen/kg in value for customs duty	1.90yen/kg	90 yen/kg	1.90yen/kg		For the Pooled Quota Free Other than for the Pooled Quota 1.90 yen/kg	For the Pooled Quota Free	
		III Other							
	284	I Containing lactose, milk protein or milkfat	22.30%	35%	22.30%	29.80%	10.8%～ 22.3% **3	Put up in containers for retail sale, not more than 500 g each including container 10.8% For the Pooled Quota Other 22.2%	
		II Other	1%	30%	1%				
	510	Those the largest single ingredient of which is sorbitol by weight except for sugar				29.80%	For the Pooled Quota Free Other than for the Pooled Quota 1%	For the Pooled Quota Free	
	590	Other				29.80%	For the Pooled Quota Free Other than for the Pooled Quota 1%	For the Pooled Quota Free	

Statistical code		Description	Tariff rate						
H.S.code			Türkiye	General	Temporary	ASEAN	CPTPP	EU	US
		b Other							
	291	イ Prepared edible fats and oils, containing more than 15% and less than 30% by weight of those of heading 04.05	21.30%	25%		21.30%	For the Pooled Quota 14.5% Other than for the Pooled Quota 21.3%	For the Pooled Quota 14.5%	
		□ Bases for beverage, nonalcoholic							
	292	ｲ Containing Panax ginseng or its extract	12%	12%		Free	Free	Free	Free
	293	▯ Other	10%	22%		Free	Free	Free	Free
		ハ Other							
	294	ｲ Of products specified in heading 04.10	9%	12%		Free	Free	Free	
		▯ Other							
		I Food supplement with a basis of vitamins or hydrolyzed vegetable protein	12.50%	12.50%					
	295	Food supplement with a basis of vitamins				Free	Free	Free	Free
	296	hydrolyzed vegetable protein				Free	Free	Free	Free
		II Other							
	301	I Protein preservative of a kind used for manufacturing frozen minced fish, obtained from sorbitol and other materials stipulated by a Cabinet Order, which have been prepared by processes stipulated by a Cabinet Order	Free	Free		Free	Free	Free	
	299	II Other	15%	25%		15%	1.80%	1.90%	1.80%

RELATED LEGAL SYSTEMS, REGULATIONS

Food Sanitation Act (https://www.mhlw.go.jp/stf/seisakunitsuite/bunya/0000144562.html)

Main items	Regulatory authority	Regulations when importing
Food (confectionery, beverages, etc.) water, food additives, supplements, etc.	Ministry of Health, Labour and Welfare (MHLW)	Notification must be made to MHLW

《Outline》

- **The Food Sanitation Act aims to prevent sanitation hazards resulting from eating and drinking and to ensure food safety thereby protecting citizens' health. The Act also applies to imported foods.**
- **A person who intends to import food, etc. for the purpose of sale or to use in business is obliged to make an import notification from this perspective to ensure food safety, based on Article 27 of the Food Sanitation Act.**
- **Notifications are accepted at the quarantine station, where a food sanitation inspector examines the foods and products to confirm their compliance with the criteria and standards of the Food Sanitation Act, and the necessity of an inspection. (A consultation service is available.)**

《Notification procedures》

(1) Preparing for documents needed for the notification:
- ◆ Notification Form for Importation of Foods, etc.
- ◆ Other documents
  - · Description of raw materials and manufacturing processes (processed foods, etc., as required)
  - · Health (sanitary) certificate (as required)
  - · Test results (as required)

(2) Submit the completed Notification Form and other documentation to the quarantine station responsible for the port of import.

(3) The notification form and other documentation submitted are examined by a food sanitation inspector based on legislation to determine the necessity of inspections.

(4) When the document examination and cargo inspection have found that the cargo conforms to the act (the cargo "passed" the inspection), a "Certificate of Notification" will be returned to the importer from the MHLW quarantine station where the notification was first submitted.

《Recent amendments to Food Sanitation Act》

· To secure food safety against changes in environment surrounding food and food internationalization, the Food Sanitation Act has been amended in 2019 as follows:

(1) Reinforcement of wide-area food poisoning incident response

(2) Institutionalization of sanitation control in compliance with HACCP

(3) Obligation to notify health damage incident caused by intake of their food products containing the designated ingredients or components

(4) Introducing a positive list system for food containers and packaging
Reference of lists:
https://www.mhlw.go.jp/content/11130500/000638983.xlsm
https://www.mhlw.go.jp/content/11130500/000635356.xlsx

(5) Revision of licensing system and establishment of notification system for food business

(6) Obligation to notify food recall information to the government

(7) Further enhancement of import and export food safety certification:
For the purpose to confirm that the inspections and control have properly been conducted in the exporting countries for insurance of safety of imported foods, sanitation control based on HACCP and attachment of sanitation certificates of dairy products or aquatic food are required as a requisite of import.

《Other key points to notify》

Food additives and pesticide residues are also regulated by the Food Sanitation Act. Since there are often publicized cases of violations of food additives and pesticide residues in imported foods, a positive list is provided here.

Food additives

- Food additives such as preservatives, sweeteners, colorants, and flavoring agents used in the process of food production or for the purpose of food processing and preservation are also regulated under the Food Sanitation Act. MHLW allows the use of food additives only when they have been judged by the Food Safety Commission as not inflicting any risks on human health, and only after specifying standards for ingredients and criteria for their use. MHLW also strives to ensure the safety of food additives that have been approved for use by, for example, surveying the per capita intake of food additives. See below for the positive list of food additives.

Excel https://www.mhlw.go.jp/content/001031538.xlsx

Pesticide residue

- To ensure that pesticide remained in food not to inflict on human health, MHLW sets the residue standards for all agricultural chemicals, feed additives, and animal drugs. The residue standards are set by the Food Safety Commission for each food within the range of amount not harmful to intake. Any foods with agricultural chemicals, etc. remained at the level surpassing the standard are banned for sale or import by the Food Sanitation Act.
- To ensure that pesticide residues do not exceed standards, the Ministry of Agriculture, Forestry and Fisheries (MAFF) sets standards for use according to the Agricultural Chemicals Regulation Act in accordance with residue standards. In addition, when food products are imported, they are inspected for pesticide residues at the quarantine station.

For the search on pesticide residue standard values: https://db.ffcr.or.jp/front/

Food Labeling Act（https://www.caa.go.jp/en/policy/food_labeling/）

Main items	Regulatory authority	Measures to take
All food items sold for consumers, etc.	Consumer Affairs Agency	Labeling on container packages in Japanese language

《Labeling details》

・ Following nine items are needed to be labeled for foods sold to consumers:

Items to label	Descriptions
1. General name	Indicate common name that expresses the process food contents.
2. Storage condition	Storage condition of the product before opening the package should be indicated in accordance with the characteristics of the food, such as "Store at room temperature out of direct sunlight", "Store at 10°C or below", etc.
3. Use by date or Best before date	Label "use by date" for foods that are quick to deteriorate in quality, while label "best before date" for all other foods.
4. Ingredients used	・Indicate the most common name of raw materials used, in descending order of percentage by weight. ・For composite materials that comprise two or more of raw materials, list all materials in descending order of percentage by weight within the parentheses after the composite material name.
5. Additives	Indicate the name of substance for additives, in descending order of percentage by weight, except for those used for nutritious enhancement, processing aids, or those that can be applied to the "carry-over" principle.
6. Content or solid volume and total content	Indicate content weight, content volume, or content quantity. Content weight should be labeled in grams or kilograms, content volume in milliliters or liters, and content quantity in units such as number of pieces.
7. Amount and calorific value of nutrients	For consumer processed foods, calories, amount of protein, fat, carbohydrate, and sodium should be indicated.
8. Name and address of food business operator	Of food business operators, indicate the name and address of the person who is responsible for food labeling descriptions.
9. Location of manufacturing or processing plant and name of manufacturer or processor, etc.	Indicate the location of manufacturing or processing plant and the name of manufacturer or processer. For imported products, indicate the location of the importer's office and the name of the importer.

- In addition to the above, some items need to be indicated if certain requirements are met. The following two items need particular notice.

Items to indicate	Descriptions
Allergen	· Allergen labeling is mandatory for processed foods made from specified raw materials and foods containing additives derived from specified raw materials. · Allergen labeling is recommended for processed foods made from ingredients equivalent to specified raw materials. **Mandatory to label - Specific 8 ingredients:** Shrimp, crab, walnut, wheat, soba (buckwheat), eggs, milk, peanut **Recommended to label – 20 ingredients equivalent to specified raw materials:** Almond, abalone, squid, salmon roe, orange, cashew nut, kiwi fruit, beef, sesame, salmon, mackerel, soybean, chicken, banana, pork, macadamia nut, peach, yam, apples, gelatin
Country of origin	For imported products, name of the country of origin should be indicated.

(Source: "An Introduction of Rule in Japan "Food Labeling Guide" - Aiming for Food Safety and Reliability" by Food Labeling Certification Association, Consumer Affairs Agency)

"Act on Securing Quality, Efficacy and Safety of Products Including Pharmaceuticals and Medical Devices", "Act against Unjustifiable Premiums and Misleading Presentations", and "Health Promotion Act"

- Under the Act on Securing Quality, Efficacy and Safety of Products Including Pharmaceuticals and Medical Devices (regulatory authority: MHLW), drugs and medical devices are intended to treat or prevent diseases and must be approved by the Ministry of Health, Labor and Welfare (MHLW). Dietary supplements, positioned as food, are prohibited from labeling or advertising efficacy that could be misinterpreted as that of a drug.

- Labeling and advertisement of dietary supplements are limited to within the scope of general foods, such as nutritional support and health maintenance. Other legislation that deals with supplements includes the Food Labeling Act, the Food Sanitation Act, the Health Promotion Act, and the Act against Unjustifiable Premiums and Misleading Presentations. For labeling or advertisement expressions, the Health Promotion Act and the Act against Unjustifiable Premiums and Misleading Presentations are related in great deal.

Regulatory authority	Name of the law	Prohibitions	Major prohibited cases
Consumer Affairs Agency	Health Promotion Act	Deceptive and exaggerated ads	· Indication of efficacy on treatment or prevention of diseases. · Indication of efficacy mainly for general augmentation or improvement of body tissue parts (except for "Foods with Functional Claims"). · Indication of suitability to a specific health use (except for the cases of FOSHU and "Foods with Functional Claims") · Indication of nutritional benefits (except for the case of "Food with Nutrient Function Claims")
Consumer Affairs Agency	Act against Unjustifiable Premiums and Misleading Presentations	Unjustifiable and misleading descriptions	· Indication to general consumers of being significantly superior to reality. · A discrepancy between the impression or expectation for the efficacy of health maintenance or promotions held by general consumers from the food advertisement, etc. and the actual efficacy. · Indication of health maintenance and promotion efficacies that significantly differ from the reality or that significantly mislead consumers.

Market Information

MARKET TRENDS IN RECENT YEARS:

《Entire dietary supplements》

Major forms of supplements:

Powder/granules	Tablets	Soft gel capsules	Hard capsules	Mini drinks
				

(Sources of images: Mini drink bottles from the official website of Tombow Beverage Co. Ltd., others from the official website of Sunsho Pharmaceutical Co., Ltd.)

- Most of supplement manufacturers in Japan do not have their own factories but rather produce by outsourcing the manufacturing processes to OEMs. Many supplements are made in the form of powder or tablets due to lower cost for manufacturing. There is a tendency of choosing other forms only when the ingredient of the supplement is inadequate for powder, granules, or tablets. For example, soft gel capsules are often used for lipophilic components, while hard capsules are chosen for heat-sensitive lactic acid bacteria.
- Mini drink bottles are generally adopted for the supplements for beauty, for recovery from fatigue and increase health, or prevent from or care after drinking too much.

Major packages of dietary supplements

Aluminum foil pouch	Plastic bottle	Stick package in box	Glass bottle
			

(Sources of images: Aluminum foil pouch from the official website of FANCL CORPORATION, bottles and stick package from Suntory Wellness website by Suntory Holdings Limited.)

- Dietary supplements are roughly categorized into Foods with Functional Claims, Food for Specified Health Uses (FOSHU), and others.
- Foods with Function Claims was introduced in 2015. To show that the supplement belongs to Foods with Function Claims, supplement business operators are required to submit to and to be received by the Consumer Affairs Agency, the Japanese governmental agency, the supplement information based on scientific evidence such as human clinical test results on healthy efficacies expected to be bring about by the functional component contained in the supplement. Only then, they can label the claims on the product package under the business operator's own responsibility. Unlike FOSHU, which needs approval by the government as stated below, Foods with Function Claims have lower hurdles for business operators to

market. Therefore, it has expanded to occupy approximately 20% of the entire dietary supplement market (based on value). However, health hazards caused by a certain supplement found out in March 2024 are expected to temporarily shrink the supplement market that belongs to Foods with Function Claims.

- FOSHU was set up in 1991 as a regulatory system to approve the statements made on food labels concerning the effect on the human body. The government evaluates the claimed effects and safety, and the Consumer Affairs Agency gives approval for the labelling of each food product that satisfies the requirements. However, difficulty and costs for approval have led business operators to shift to the above-mentioned Foods with Functional Claims, diminishing the market size of FOSHU.
- In Japan, dietary supplements that do not belong to Foods with Functional Claims or FOSHU are widely distributed. Ever since foods in the form of tablets and capsules that used to be only adopted for drugs have been deregulated in the latter half of 1990s, they have widespread. Although efficacy labeling on the food product package is prohibited, except for Foods with Functional Claims and FOSHU, business operators elude violation of laws by taking the method of implicit expressions for health or beauty effects by the components contained in the supplement product.
- Supplements that keep on growing the sales in Japan in recent years are DHA and EPA. As Foods with Functional Claims and FOSHU, they are labeled to have the effects of reduction in blood triglyceride levels and memory maintenance. In addition to that, DHA and EPA have increased awareness as important fatty acids to be taken proactively for being contained in blue-back fish, the conventionally well-known healthy food in Japan. They sell well also as the supplements other than foods with functional claims and FOSHU.
- Lactic acid bacteria show favorable sales in recent years due to increased awareness of various health effects such as immunity, other than improvement of intestinal condition, the effect conventionally known.
- Main supplement users are the middle-to-old age group with high consciousness on health and aging care and young generation that consciously take vitamins and minerals. In the annual online consumer survey taken place to consumers in their 20s or older by Yano Research Institute, supplement users occupy approximately 30%, and the percentage has been kept every year without large fluctuations.
- In addition to supplements, a variety of foods are distributed as foods with potential health functions, such as soft drinks, condiments, natural foods, fermented foods, etc., and consumers choose the ones that suit them according to their food preferences.

《Protein》

- There are various types of products for consumers, such as those in the form of powder, drink, bar, and jelly.

Powder	Drink	Bar	Jelly
			

(List of Meiji "ZAVAS" series products by form / Image source: official ZAVAS website)

- Powder types are widely accepted among users as a cost-effective product. Along with expansion of the protein market, an increasing number of companies have entered the market, making the competition fiercer. Because companies can rely on OEMs for production, the market attracts many entrants. The challenge for the market players is the difficulty to differentiate from others by the taste of powder or by product standard, which can easily be involved in price competition.
- For drink types, the protein brand ZAVAS by Meiji, a major dairy manufacturer, is the sole leader in the market (https://www.meiji.co.jp/sports/savas/english/). A variety of flavors, pocket size to carry, easily available at convenience stores and supermarkets are the reasons for strong sales, which are growing year by year. The company's proprietary technology, which stabilizes milk protein in the acidic range for superior absorption, and its sales channels as a major dairy manufacturer are its strengths, which do not let other companies to pursue easily.
- There are products in the form of candy bars and pocket-size jelly with higher formulation of protein. Protein bars in Japan are developed mainly by domestic confectionery manufacturers. To mask the taste of protein, many of such products are chocolate coated. The market has grown by obtaining demand for eating between meals but has not reached the level of remarkable expansion, because of the competition with tastier and handier drinking types. Meanwhile, although the entire drinking jelly market is on the rise, demand for jelly products with protein formulation has not grown much, because of, just like the case of protein bars, the competition with drink-type protein products.
- As for the source of protein, there are roughly two types, whey protein and plant-based protein. With stronger impression to augment muscles, whey protein has larger distribution ratio, well-consumed by the intensive exercising population. Plant-based protein mainly comprises of soy protein, supported by women who want to be slim while building muscular strength at the same time.

DISTRIBUTION, SALES CHANNEL

《Dietary supplement》

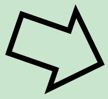
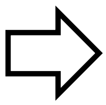
Market size transition by sales channel

(Unit: 1,000 USD)	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	CAGR 2018-2027
	Fiscal year											
Supplement market	5,591,953	5,700,682	5,706,439	5,730,858	5,840,116	5,863,675	5,952,683	5,608,132	5,327,726	5,327,726	5,381,003	-0.6%
Door-to-door sales	1,517,438	1,486,996	1,464,695	1,458,871	1,435,378	1,404,937	1,377,142	1,322,057	1,269,175	1,231,099	1,206,477	-2.3%
Mail order sales	2,666,931	2,732,447	2,759,579	2,875,521	2,993,448	2,949,706	2,955,595	2,719,148	2,555,999	2,581,559	2,633,190	-0.4%
Pharmaceutical channel	766,329	807,359	821,918	823,572	849,712	925,352	1,005,228	954,967	907,218	925,363	957,750	1.9%
Sales channel for food	180,663	181,325	182,384	171,266	171,398	178,678	182,648	173,516	166,575	164,910	163,260	-1.2%
Health food channel	129,707	153,067	140,361	114,288	85,037	72,795	83,184	79,025	73,493	69,084	65,630	-9.0%
Sales overseas	-	-	64,059	80,868	88,743	86,030	85,501	85,501	85,501	86,356	88,083	-
Other sales channel	330,885	339,488	273,443	206,472	216,399	246,178	263,384	273,920	269,765	269,356	266,613	-

*Figure for FY2023 is the projection, and for FY2024 is the forecast.

(Estimated by Yano Research Institute)

Major sales channels for dietary supplements and characteristics

Sales channel	Characteristics	Growth potential	Dealings and sales of supplements
Door-to-door sales	・ The market developed mainly through multi-level marketing (MLM). ・ Japanese subsidiaries of foreign companies, mainly in the United States, the home of MLM, and Japanese companies are the market players. ・ By explaining (or persuading) the details of products to customers, expensive products sell well. ・ Under strict laws and regulations and crackdown by relevant government agencies, some cases have been exposed as fraud.		・ Many expensive supplements are handled. ・ A salesperson has room to explain the product properties (health functions) that cannot be understood by the product package. However, as labeling of any efficacy for products other than drugs is banned, sales activities must be within the scope that does not conflict with laws and regulations.
Mail order sales	・ Major sales channel for dietary supplement. ・ There are business forms of in-house mail order sales, store rollout on online shopping websites, and wholesaling to mail order sales businesses. ・ There are both online and offline sales channels. ・ Online sales have expanded mainly through Amazon in recent years. ・ Offline sales mainly use TV, newspapers, and radio		・ Products with a wide range of prices are available. ・ While ad expressions are valued in mail order sales, and because no labeling of efficacy like used in drugs is allowed, deals of supplements notified as foods with functional claims are expanding. ・ Health hazards found out in March 2024 are likely to diminish the market temporarily but are expected to recover after the issue quietens down.

	advertisements, heavily used by the elderly.		
Pharmaceutical	· The sales channels for drugs, i.e., drugstores, chemist's and pharmacies. · Other than drugs, cosmetics, daily necessities, and foods are also handled, with supplements sold as one of main merchandises. · The sales channel that consists mainly of drugstores or chemists at which customers can freely buy products, unlike pharmacies where a chemist’s advice is needed. · Many pharmacies are privately owned and are in decline as drugstores have expanded. They excel at conversational sales.		· Drugstores sell many low or mid-price supplements. As products are sold on a 'help-yourself' basis, there are abundant products that use well-known ingredients or components, or those foods with functional claims that are allowed to label health functions. · Pharmacies deal in expensive supplements, because they excel at conversational sales. · Health hazards found out in March 2024 are likely to affect the sales at drugstores due to reluctant consumer purchasing, but the market is projected to be back to previous status after recovery in consumer sentiment.
Sales channel for food	· The sales channel that mainly comprises convenience stores and supermarkets.		· Dietary supplements sold at convenience stores are centered on mini-drink types. As Japanese people tend to use mini drinks to obtain quick effectiveness, the products have good affinity with convenience stores due to availability and accessibility to any stores. · Supermarkets have a wide range of assortments in staple supplements such as vitamins and minerals, but the sales composition is small. · As the number of convenience stores is saturating, remarkable growth for the future is vague.
Health food channel	· Specializes in supplement sales. · There are stores that deal in in-house brands and those that procure products from suppliers. · Some are the tenants of commercial facilities such as department stores, shopping centers, etc., and some are free-standing stores.		· As conversational sales are available, many expensive products are handled. · Two supplement manufacturers (DHC, Fancl) operate their directly owned stores, selling supplements as well as cosmetics. A company called AFC operates its own stores at department stores. With no other supplement-specialty stores, no growth of such stores is observed in Japan.

Overseas	・ Companies that export mainly to Asian countries through cross-border ecommerce or general trading are increasing. ・ While supplement sales in Japan decelerates, supplement manufacturers seem to look for overseas for the next growth.		・ Although sales of supplements to China temporarily expanded, they stalled due to political issues and economic recession in China. ・ Some supplement manufacturers aim to expand exporting to Taiwan with many pro-Japanese and to Southeast Asian countries with higher health consciousness than before.
Other	・ Fitness/athletic gyms, aesthetic salons, and medical institutions are included here. ・ Selling goods to facility users.		・ Fitness/athletic gyms handle sports supplements, beauty supplements, and supplements for weight loss, while aesthetic salons deal in beauty supplements. Some medical institutions sell supplements according to the medical department of the institution, such as beauty supplements in aesthetic medicine. ・ Expert recommendations are a major strength. There is an example of rapid growth in sales of an original product, protein, at a fitness gym targeting middle-to-older aged women.

Major sales channels for protein and characteristics

- Protein powder products have different sales channels from other forms of protein products such as protein drinks.

《Protein powder》

Sales channel	Characteristics	Growth potential	Dealings and sales of supplements
Mail order sales	· Fastest-growing channel in the protein powder market · Online shopping sites like Amazon and in-house mail order services are the mainstay.	↗	· Many manufacturers increased sales, especially via Amazon. · After obtaining customers at Amazon, some companies attract them to in-house mail order channel.
Drugstore	· Mainstay channel among over-the-counter sales channels · Obtained demand from physical store customers, with extensive stores from urban to suburban areas. · Many drugstores adopt sales promotion measures including discount system to encourage customer visits and purchases.	→	· With the recent expansion of the protein market, many drugstores have broadened their sales floors to bolster product assortment. · Tend to deal in well-selling brands. Emerging brands may face difficulty entering.
Discount store	· Don Quijote Co., Ltd. that deals in various products from daily necessities to foods, leads the market with more than 600 stores nationwide. · A wide customer base, centered on the young generation.	↗	· Tend to prefer novelty. Many protein products with funny names and unique flavors are sold.
Membership supermarket	· Costco Wholesale Corporation is the sole leader, increasing its stores in Japan. · Strengths in price appeal of large-volume products, etc.	↗	· Giant-size protein, overseas brand protein products, are sold. Received support from heavy protein users.
Sporting good shop	· Once a major sales channel for the protein market. · Mainly deals through sporting goods wholesalers · Good at conversational sales, but are on the decline, due to competition with the mail order service.	↘	· Many athletes and sporting customers are the visitors. Mainly sell Japanese long-established protein brands.
Training gym	· Tend to enhance product sales, aiming to increase purchases per customer.	↗	· The cases of major training gyms selling their original protein products are increasing.

	・ Strength in sales through trainer recommendations. ・ However, withdrawals of training gyms are increasing. Discard and selection of gym are on the rise.		

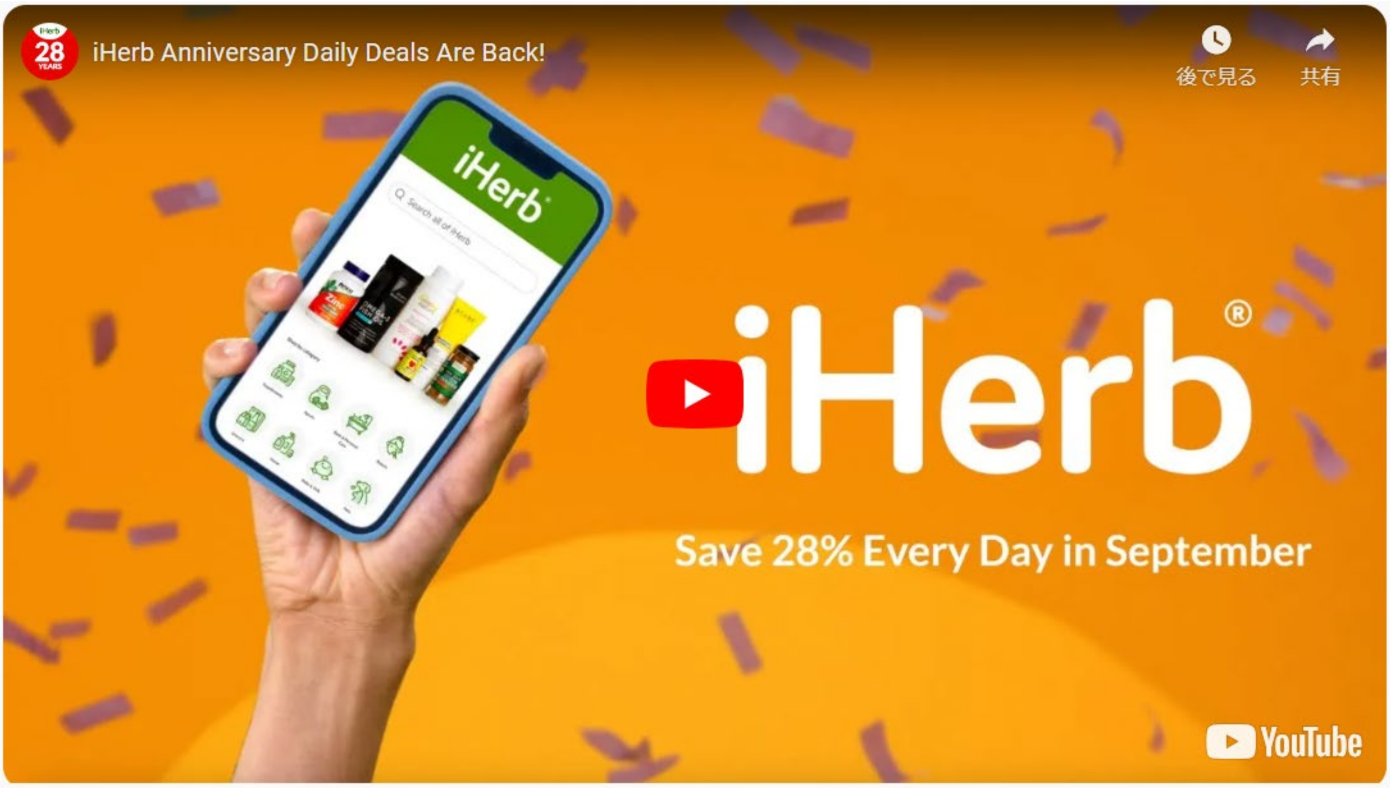
《Protein drink, bar》

Sales channel	Characteristics	Growth potential	Dealings and sales of supplements
Convenience store/ Supermarkets	・ Main sales channel for protein drinks and bars. ・ Especially, convenience stores are supported because of handiness and accessibility, due to many in number of stores.	↗	・ With small floor area, convenience stores tend to sell only well-selling products, so that new companies and brands face difficulty to enter. ・ AEON CO., LTD., major supermarket operator, sells protein contained foods under its own private brand, such as protein bars, drinking jellies, etc.,
Drugstore/ Discount store	・ Tend to strengthen food sales. Many have installed refrigerated cases for selling drinks, which increased drink distribution. ・ Supported by price conscious customers because of frequent discount sales.	↗	・ Tend to have similar product assortments as convenience stores and supermarkets. ・ Due to price-oriented business, tend to sell products at discount price or low price.
Training gym	・ Food type protein products such as protein drinks and bars are in demand, as they are convenient for protein supplementation immediately after training.	→	・ As it is the most suitable place to introduce products to population with high consciousness on protein, protein manufacturers, in many cases, tie-up with training gyms to offer samples to taste.
Mail order service	・ Customers tend to buy their favorite protein products in bulk.	↗	・ Customers tend to buy products in bulk, such as by the case. ・ Minor brand products are available that cannot be purchased at stores.

POSITIONING OF DOMESTIC PRODUCTS AND IMPORTED PRODUCTS

- While domestic supplement products are supported mainly by the elderly, purchase of overseas supplements through ecommerce is on the rise mainly by young customer base.
- While domestic products have multiple materials and components contained, aiming to maximize the expected efficacy of health and beauty, overseas products rarely formulate multiple materials and components and tend to sell at affordable prices. The following two brands are from overseas that have attained rapid growth in the Japanese market.

iHerb (Headquarters in the United States)



(Sources of image: iHerb official website)

- Founded in 1996. Have more than 50,000 items for health and wellness. There are more than 10.5 million users from more than 180 countries.
- 8 climate-controlled hubs & fulfillment centers in the United States and Asia. For products going to Japan are distributed from South Korea and Hong Kong warehouses. Products at these two warehouses are delivered directly from the company’s main hub in California.
- With lower price than Japanese supplements, customers can buy supplements that contain components not available from domestic products. The company seems to be expanding the business expeditiously in the Japanese market.

Myprotein (By the Hut.com Ltd., Headquarters in the United Kingdom)

・ (Sources of images: Myprotein official website)

- Founded in Manchester in 2004. Selling products in 70 plus countries ever since.
- Armed with cost-effective, low-price products, centered on protein powders, the company has accelerated the business expansion in Japan. Currently, it seems to enjoy $6600 USD or more of the sales in the Japanese market.
- In 2021, ITOCHU Corporation, a leading Japanese general trading company, has signed an exclusive license for manufacturing Myprotein products in Japan from the brand owner, Hut.com, Inc. ITOCHU now imports and procures the ingredients and manufactures, designs for standards, and sells the merchandise in Japan. In addition to launching a new protein product, the company started selling 9 essential amino acids “EAA”, which is available at the major discount store Don Quijote and the membership supermarket Costco in Japan.

CHARACTERISTICS OF MAJOR PRODUCTS & TOP-SELLING PRODUCTS

Dietary supplement

《Top selling products》

Manufacturer	Product name	Standard	Price (with tax) *
Suntory Wellness	DHA & EPA + Sesamin EX	180 capsules (for approx. 30 days) 360 capsules (for approx. 60 days)	$39.3 USD $67.9 USD
Ingredients	Refined fish oil containing DHA and EPA, edible oils and fats containing ARA/gelatin, glycerin, hematococcus algae pigment		
Characteristics	Food with a Functional Claim that lists three omega fatty acids, DHA, EPA, and ARA (arachidonic acid), which contribute to brain health, as the functionally active ingredients. Labeled for its effects related to cognition function. The product also contains sesamin, included in sesame, the mainstay component provided by the company. Sesamin is expected for prevention of DHA oxidation and antiaging functions. Main users are the mid-to-old population.		
Product image (Source: Company website)			

*10% discount applied to mail order subscriptions.

Protein

《Top selling products》

Manufacturer	Product name	Standard	Price (with tax) *
Leverage Inc.	VALX WPC Whey Protein	1 kg	$27.7 USD
Ingredients	[Chocolate flavor] Whey protein (manufactured in US), cocoa powder, edible vegetable oils and fats, salt, maltodextrin/emulsifier, fragrance, sweetener (aspartame L-phenylalanine compound, sucralose), processed starch (some milk component and soybeans included). According to the flavors some products include vitamin E, green tea extract, or red yeast dye.		
Characteristics	By eliminating drinking difficulty of protein, the product has pursued taste and solubility. Offers 10 mainstay flavors and limited-season flavors.		
Product image (Source: Company website)			

*10% discount applied to mail order subscriptions.

Manufacturer	Product name	Standard	Price (with tax)
Meiji Co., Ltd.	ZAVAS MILK PROTEIN zero fat	430ml	$1.25 USD
Ingredients	[Clear taste of muscat: Milk protein (manufactured in New Zealand or in US), dairy products/trehalose, acidulants, stabilizer (polysaccharide thickener: derived from soybeans), sweetener (sucralose, acesulfame K), fragrance, vitaminB6, vitamin D.		
Characteristics	Contains 15g of milk protein that is effective to build the body in a 430ml product. Intake after exercise will quench the thirst while supporting to build ideal body. By the company's proprietary technology that stabilizes milk protein in the acidic range, protein is quickly absorbed without coagulating in the stomach. This has been patented.		
Product image (Source: Company website)			

Manufacturer	Product name	Standard	Price (with tax)
Asahi Group Foods, Ltd.	Ippon Manzoku Bar (chocolate)	1 bar（39g)	$0.98 USD*
Ingredients	Chocolate (Sugar, cacao mass, whole milk powder, vegetable oil and fat, cocoa butter, others) (manufactured in Japan), soy puff (soy protein, starch, vegetable oil and fat) (contains wheat), whey protein, vegetable oil and fat, soy processed products, raisins, glucomannan / Ca carbonate, emulsifier, trehalose, leucine, fragrance, lysine, valine, Isoleucine, threonine, V.E, phenylalanine, methionine, histidine, V.B6, V.B2, tryptophan, V.B1, V.B12.		
Characteristics	Milk chocolate with a strong cocoa fragrance is used. The sourness of raisins gives an accent in taste. 15g of protein is contained in a bar.		
Product image (Source: Company website)			

* The price at Amazon (per bar, as of 19 Sep. 2024)

- The protein powder market in Japan is currently at the status of 'red ocean'. Each company develops products that have taste and water solubility improved, the challenge of protein powder. However, it is difficult to show the efforts of differentiation due to the product designs. Companies with growing sales are those good at planning and implementing the marketing strategy.
- ZAVAS MILK PROTEIN by Meiji almost dominates drink type protein products. It is because of the company's proprietary technology to have developed the product as a drink type, and of the ability to secure effective sales channels as a major dairy manufacturer. These have facilitated acquiring user demand for handiness in protein products and to keep on increasing the sales.
- At the time when protein demand soared during the pandemic as many people started to train themselves at home, the sales of protein bars grew, too. Especially, Ippon Manzoku Bar PROTEIN that contains protein in the product series, developed by Asahi Group Foods, Ltd. that has a well-known chocolate bar brand, showed prominent sales. It once went through the status of production not keeping up with the demand. Currently, the sales have overall settled down, due to the protein boom having subsided and the emergence of drink-type products.

MAJOR IMPORTERS

- For supplement produced overseas, prior-mentioned "iHerb" sell its products to Japanese customers directly via ecommerce (B2C), while "Myprotein" (the Hut.com Ltd.) also used to directly sell its products through ecommerce, before it has established Japanese subsidiary to expand its business in Japan, added with having signed an exclusive manufacturing license for the Myprotein brand in Japan with ITOCHU corporation, a major Japanese general trading company.
- Supplements distributed in Japan are mostly domestically produced other than those mentioned above. There does not seem to be any importer that particularly focuses on supplements.
- When considering exporting food to Japan, it is necessary to choose a right business partner in Japan, depending on the type of foods (supplement, general food, etc.,) the sales channel (mail order, food retailer, etc.,) and the business form (B2B/B2C).

Importers specializing in Türkiye

Company name	Location	Description	URL
Tugba Trading CO., LTD.	4-20-40, Yahara, Nerima-ku, Tokyo	Importer of Turkish products. Develops restaurants in Japan.	https://tugba.co.jp/jp/
Marre Co., Ltd.	6F, Kisuke Nishishinbashi Bldg., 2-19-4 Nishishinbashi, Minato-ku, Tokyo	Importer of food ingredients, that has started from Turkish foods. Currently, manufactures foods, too (Halal food manufacturing, dried fruit repacking).	https://www.marre.co.jp/

Major food-specific trading companies that do business with Middle East Countries

Company name	Location	Description	URL
Wismettac Foods, Inc.	15F, Nihonbashi Muromachi Mitsui Tower, 3-2-1, Nihonbashi Muromachi, Chuo-ku, Tokyo	Trading company that deals in various foods.	https://www.wismettac.com/ja/group/group/wfoods.html English: https://www.wismettac.com/en/group/group/wfoods.html
KOKUBU GROUP CORP.	1-1-1 Nihonbashi, Chuo-ku, Tokyo	General trading company and wholesaler. Has a long history of having involved in food distribution in Japan.	http://www.kokubu.co.jp/ English: https://kokubu.co.jp/english/
NIPPON ACCESS, INC.	Sumitomo Fudosan Osaki Garden Tower 1-1-1 Nishi-Shinagawa, Shinagawa-ku, Tokyo	Trader and wholesaler of food in Japan. Advantage in cold chain logistics service.	https://www.nippon-access.co.jp/ English: https://www.nippon-access.co.jp/en/

2. Chocolate

Key points of the market trend and characteristics

- **Since Japan has four seasons, and the summer is very hot and humid, chocolate tends to sell well in the fall and winter. Therefore, manufacturers and distributors try to sell confectionery using chocolate (baked goods, ice cream, drinks, etc.) to balance the sales in the four seasons.**

- **Chocolates can be categorized into those sold by manufacturers such as GODIVA, enjoying gift applications, and those widely distributed, common chocolates sold in supermarkets. Their targets are different, so they have different distribution channels according to the targets.**

- **The gift chocolate market is hugely influenced by Valentine's Day sales. While the trend of ritual gifts at the office has become obsolete, the purchase of chocolates to treat oneself has increased in recent years.**

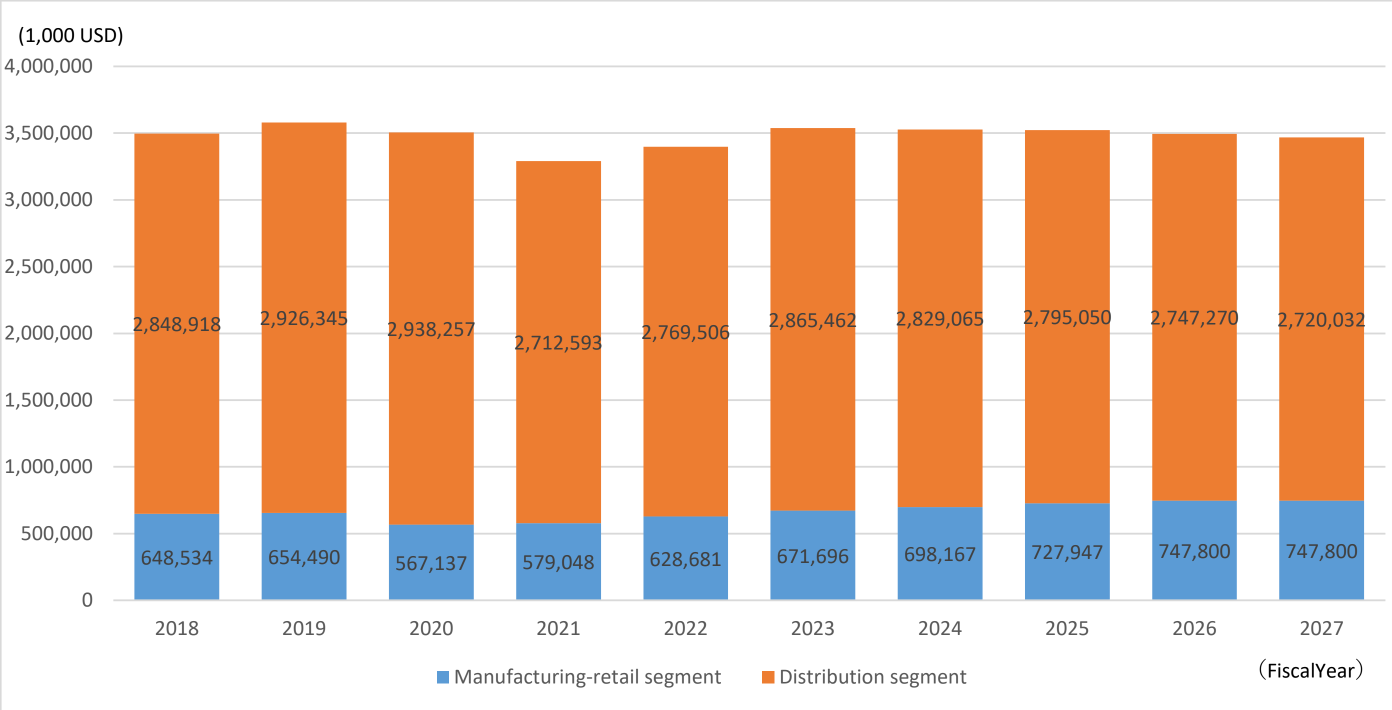
- **The price of cocoa beans has skyrocketed since the fall of 2023, and combined with the weak yen, manufacturers in Japan have found that they need to make some efforts to develop chocolate products for Valentine's Day. Because the selling price of bonbon de chocolat would be too high, manufacturers are striving to prepare chocolate products that require a smaller amount of chocolate.**

- **Even among widely distributed chocolates, there has been an increase in products that use white chocolate or that combine cookies or biscuits with chocolate. This trend is likely to continue in the coming years.**

- **Sales of imported chocolate continue to be sluggish, due to the recent price rise and the weak yen. Expensive gift chocolates can gain fans when the chocolatier is awarded in some pâtissier competitions, even if the products are expensive. On the other hand, sales of imported chocolates in supermarkets are stagnating because the price has been too high.**

Market Size

MARKET SIZE TRANSITION AND FORECAST (BY VALE, FY2018 TO FY2027)



	Fiscal Yar										CAGR
(1,000 USD)	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2018-2027
Chocolate total	3,497,452	3,580,835	3,505,393	3,291,642	3,398,187	3,537,158	3,527,232	3,522,996	3,495,070	3,467,831	-0.1%
Year-on-Year	98.5	102.4	97.9	93.9	103.2	104.1	99.7	99.9	99.2	99.2	
Manufacturing-retail	648,534	654,490	567,137	579,048	628,681	671,696	698,167	727,947	747,800	747,800	1.6%
Year-on-Year	100.8	100.9	86.7	102.1	108.6	106.8	103.9	104.3	102.7	100.0	
Distribution segment	2,848,918	2,926,345	2,938,257	2,712,593	2,769,506	2,865,462	2,829,065	2,795,050	2,747,270	2,720,032	-0.5%
Year-on-Year	98.0	102.7	100.4	92.3	102.1	103.5	98.7	98.8	98.3	99.0	

*Figures for FY2024 and beyond are the forecasts.

(Estimated by Yano Research Institute)

- Japan has four seasons. Given the high temperatures and high humidity during the summer months, chocolate sales tend to be prevalent during the autumn and winter months. Accordingly, confections made with chocolate (baked goods, ice confections, drinks and other sweets) are deployed to market in the spring and summer months when temperatures are high, to prevent sales from being heavily weighted to the autumn and winter months.
- In Japan, the chocolate market is divided, based on distribution format, into the manufacturing-retail segment and the distribution segment. The manufacturing-retail segment primarily consists of chocolate products for gifts, mainly GODIVA, and the distribution segment comprises wholesale through supermarkets and convenience stores, including chocolate products from Meiji (https://www.meiji.co.jp/) and Lott (https://www.lotte.co.jp/) as well as imported confections such as FERRERO ROCHER.

- In FY2023, the size of the chocolate market in Japan (total for the manufacturing-retail and distribution segments) expanded to $3,537,158 thousand USD, an increase of 4.1% year-on-year. However, market expansion in FY2022-2023 was chiefly attributable to price hikes underpinned by soaring raw material prices and depreciation in the value of the yen. Taking into account the expanded implementation of stealth price hikes, sales volume shrank. Consequently, the market slightly struggled.
- From autumn 2023, cocoa bean prices skyrocketed globally. This also dealt a blow to the chocolate market in Japan. To maintain price ranges for end products to a certain degree, manufacturers combined biscuits to reduce the amount of chocolate used and took measures such as utilizing white chocolate. There is a widening outlook that this impact will be prolonged over a period of 4-5 years.

TRANSITION OF TOTAL IMPORT SIZE PER COUNTRY (HS CODE-BASED; FY2018 TO FY2023; VALUE & VOLUME)

- We calculated the import value and volume in line with HS Code 1806 as well as “1704.90-230,” which applies to white chocolate.

《Import value transition》

FY2023 Ranking	(1,000 USD) Country name	Fiscal Year 2018	2019	2020	2021	2022	2023	CAGR 2018-2023
1	Singapore	112,048	105,125	94,316	116,304	142,794	124,901	2.2%
2	Belgium	70,359	61,059	60,001	78,437	89,158	91,882	5.5%
3	Italy	40,887	38,899	50,212	64,337	66,801	70,553	11.5%
4	France	40,318	36,984	34,154	43,372	51,025	55,356	6.5%
5	Malaysia	30,694	33,729	29,884	29,047	38,974	40,913	5.9%
6	Australia	26,081	20,182	23,273	26,104	44,709	34,700	5.9%
7	South Korea	25,437	27,123	26,727	30,589	39,810	34,214	6.1%
8	United States	31,395	32,380	28,931	32,921	34,692	31,539	0.1%
9	Switzerland	15,498	14,630	12,046	16,383	22,871	26,794	11.6%
10	Thailand	13,447	11,648	11,531	12,939	19,626	23,768	12.1%
11	China	16,261	14,838	13,333	16,341	13,089	18,853	3.0%
12	Vietnam	1,347	1,913	2,614	4,989	9,885	14,690	61.3%
13	Türkiye	3,710	5,747	6,417	12,997	17,755	14,488	31.3%
	Other	41,701	38,679	41,276	48,669	50,596	58,090	6.9%
	Total	469,183	442,933	434,715	533,429	641,784	640,742	6.4%
	Year-on-Year (%)	102.2	94.4	98.1	122.7	120.3	99.8	

*Share of a total of top 13 countries: 90.9% (FY2023)

- In FY2023, the value of chocolate imports was $640,742 thousand USD (a decrease of 0.2% year-on-year). Ranked based on value of chocolate imported to Japan, Singapore was 1st (share of total chocolate imports to Japan was 19.5%), Belgium was 2nd (14.3% share) and Italy was 3rd (11.0% share). Meanwhile, based on import volume, South Korea and Malaysia ranked second and third among countries in Asia. However, for import value, countries in Europe, which boast a high unit price, ranked second and third. In FY2023, the import value for Türkiye was $14,488 thousand USD, putting it 13th among chocolate import countries, with a share of total imports to Japan at 2.3%.

- As mentioned below, the 2018-2023 CAGR overall for chocolate import volume, showed a pronounced negative trend among the top-ranking import countries. Import value increased reflecting a rise in unit prices due to impact from a climb in overseas commodity prices and depreciation in the value of the yen.

《Import volume transition》

FY2023 Ranking	Unit: (ton) Country name	2018	2019	2020	2021	2022	2023	CAGR 2018-2023
		Fiscal Year						
1	Singapore	60,567	51,158	49,415	53,856	49,046	39,321	-8.3%
2	South Korea	30,508	33,743	32,888	31,473	32,175	21,173	-7.0%
3	Malaysia	27,884	28,603	26,112	21,668	23,226	18,732	-7.6%
4	Thailand	17,807	15,712	16,304	15,582	18,146	16,839	-1.1%
5	Belgium	9,616	9,393	9,042	10,614	10,022	8,545	-2.3%
6	Australia	9,429	7,108	8,162	7,833	10,461	8,528	-2.0%
7	Vietnam	229	616	1,375	2,880	5,320	6,270	93.9%
8	Italy	4,472	4,398	5,366	6,311	5,759	5,641	4.8%
9	France	4,301	3,838	3,463	3,985	4,082	3,460	-4.3%
10	China	4,808	4,551	4,082	4,025	2,271	3,434	-6.5%
11	United States	5,052	4,527	4,158	4,076	3,761	3,206	-8.7%
12	Türkiye	735	1,467	1,830	3,341	3,575	3,035	32.8%
13	Switzerland	2,145	1,930	1,390	1,738	2,031	2,029	-1.1%
	Other	8,413	7,229	7,655	8,197	7,091	7,156	-3.2%
	Total	185,966	174,272	171,242	175,581	176,966	147,369	-4.5%
	Year-on-Year (%)	105.4	93.7	98.3	102.5	100.8	83.3	

*Share of a total of top 13 countries: 95.1% (FY2023)

- In FY2023, the chocolate import volume totaled 147,369 tons (a decrease of 16.7% year-on-year). Up to FY2022, chocolate import volume trended around 175,000 tons but in FY2023, chocolate import volume plunged. Chocolate import volume declined from China, South Korea and Malaysia, which are the three largest exporters of chocolate to Japan in terms of volume.

- Ranked based on chocolate import volume, Singapore was 1st (share of 26.7%), South Korea was 2nd (share of 14.4%) and Malaysia was 3rd (share of 12.7%). Countries in Asia were at the top based on import volume. For chocolate import volume in FY2023, Türkiye ranked 12th, with 3,035 tons and a share of 2.1%.

- Looking at trends in and after FY2018, although the share of chocolate import volume overall was low, the CAGR for Vietnam and Türkiye was high.

《Unit price transition》

	Fiscal year						CAGR
	2018	2019	2020	2021	2022	2023	2018-2023
Unit price (US＄/kg)	2.5	2.5	2.5	3.0	3.6	4.3	11.5%
Y-o-Y (%)	1.0	1.0	1.0	1.2	1.2	1.2	

- The unit price of chocolate had been hovering at around $2.5 USD/kg until 2020. It rose to $3.0 USD/kg in 2021 and further increased in and after 2022. CAGR (compound annual growth rate) of the price from 2018 onward is 11.5%, and further increase is expected in the future as cocoa bean price has been escalating globally since 2023.

Key Information for Exporting to Japan

TARIFFS (HS CODE-BASED)

*General or Temporary rate shall be applied unless a specific tariff rate is shown in the tables below.

統計番号				関税率		関税率（経済連携協定）			関税率
Statistical code		Description	Tariff rate						
番号 H.S. code			Türkiye	基本 General	暫定 Temporary	アセアン ASEAN	CPTPP CPTPP	欧州連合 EU	日米 US US◆1
18.06		Chocolate and other food preparations containing cocoa							
1806.10		Cocoa powder, containing added sugar or other sweetening matter							
		1 Containing added sugar	29.8%	35%					
	110	- Containing not less than 50% by weight of sucrose	※20.4%		※20.4%	-29.80%	For the Pooled Quota 20.3% Other than for the Pooled Quota ※20.4%	For the Pooled Quota 20.3%	
	190	- Other	29.8%			29.80%	For the Pooled Quota 20.3% Other than for the Pooled Quota 29.8%	For the Pooled Quota 20.3%	
	200	2 Other	12.5%	25%		12.50%	Free	Free	
1806.20		Other preparations in blocks, slabs or bars weighing more than 2kg or in liquid, paste, powder, granular or other bulk form in containers or immediate packings, of a content exceeding 2kg							
		1 Food preparations of goods of heading 04.01 to 04.04 containing cocoa powder in a proportion by weight of less than 10%							
		(1)Containing not less than 30% of natural milk constituents by weight, calculated on the dry matter, excluding whipped cream in pressurized containers	28%+ 799yen/kg	28%+ 799yen/kg					
	311	- For "the Pooled Quota of other milk products"	21%		21%		5.20%	10.50%	

統計番号 Statistical code 番号 H.S. code		Description	Türkiye	関税率 基本 General	暫定 Temporary	関税率（経済連携協定） アセアン ASEAN	CPTPP CPTPP	欧州連合 EU	関税率 日米 US US◆1
	319	- Other	23.8%＋679yen/kg				23.8%＋679yen/kg		
		(2)Other							
	321	A Containing added sugar	23.8%	28%		23.80%	8.60%	8.70%	8.60%
	322	B Other	21.3%	25%		21.30%	7.70%	14.50%	
		2 Other							
		(1)Containing added sugar							
		A Chewing gum and other sugar confectionery, preparations in blocks, slabs, bars and paste	29.8%	35%					
	112	- Chewing gum and other sugar confectionery, foods, containing not less than 50% by weight of sucrose	※1%		※1%	-29.80%	For the Pooled Quota Free Other than for the Pooled Quota ※1%	-10.80%	
		- Other							
	113	-- Foods, the largest single ingredient of which is sugar by weight				29.80%	For the Pooled Quota Free Other than for the Pooled Quota 29.8%	10.80%	
	119	-- Other				29.80%	For the Pooled Quota Free Other than for the Pooled Quota 29.8%	10.80%	
		B Other	28%	28%					
	121	- Containing not less than 50% by weight of sucrose	※20.9%		※20.9%	-28%	For the Pooled Quota 20.8% Other than for the Pooled Quota ※20.9%	10.20%	
	129	- Other				28%	For the Pooled Quota 20.8% Other than for the Pooled Quota 28%	10.20%	
		(2)Other	21.3%	25%					

統計番号 Statistical code 番号 H.S. code		Description	Türkiye	関税率 基本 General	暫定 Temporary	関税率（経済連携協定） アセアン ASEAN	CPTPP CPTPP	欧州連合 EU	関税率 日米 US US◆1
	210	- For the quantity (quota) stipulated on food preparations containing cocoa for manufacture of chocolate by a cabinet order, on the basis of the quantity of demand of powdered milk and such food preparations for manufacture of chocolate in the coming fiscal year (April-March), and also in consideration of other relevant conditions	Free		#Free		#Free **2		
		- Other	12.5%						
		-- Imported with the application of the benefits of concession based on EPA (the Economic Partnership Agreement) according to paragraph 1 of Article 8-6 of the Temporary Tariff Measures Law :							
	291	--- Provided for in the tariff items set out in TWQ-JP13 in paragraph 13 of Section B of APPENDIX A of ANNEX 2-D (TARIFF SCHEDULE OF JAPAN) to the Comprehensive and Progressive Agreement for the Trans-Pacific Partnership (hereinafter referred to as “the CPTPP” in this heading) or in the tariff items set out in TRQ-19 in paragraph 20 of Section B of Part 3 of ANNEX 2-A to the Agreement between the European Union and Japan for an Economic Partnership (hereinafter referred to as “the Japan-EU EPA” in this heading)					For the Pooled Quota 14.5%	For the Pooled Quota 14.5%	

統計番号				関税率		関税率（経済連携協定）				関税率
Statistical code		Description	Tariff rate							
番号 H.S. code			Türkiye	基本 General	暫定 Temporary	アセアン ASEAN	CPTPP CPTPP	欧州連合 EU	日米 US US◆1	
	292	--- Provided for in the tariff items set out in TWQ-JP14 in paragraph 14 of Section B of APPENDIX A of ANNEX 2-D (TARIFF SCHEDULE OF JAPAN) to the CPTPP or in the tariff items set out in TRQ-20 in paragraph 21 of Section B of Part 3 of ANNEX 2-A to the Japan-EU EPA					For the Pooled Quota Free	For the Pooled Quota Free		
	293	--- Other								
		-- Other								
	296	--- Provided for in subparagraph 8 (a) of Sub-Section 2 of Section B of Part 3 of ANNEX 2-A to the Agreement between the United Kingdom of Great Britain and Northern Ireland and Japan for a Comprehensive Economic Partnership (hereinafter referred to as “the Japan-UK EPA” in this heading)								
	297	--- Provided for in subparagraph 9 (a) of Sub-Section 2 of Section B of Part 3 of ANNEX 2-A to the Japan-UK EPA								
	299	--- Other					21.30%			
		Other, in blocks, slabs or bars :								
1806.31	000	Filled	10%	10%		10%	For the Pooled Quota Free Other than for the Pooled Quota 10%	3.60%		

統計番号				関税率			関税率（経済連携協定）		関税率
Statistical code		Description	Tariff rate						
番号 H.S. code			Türkiye	基本 General	暫定 Temporary	アセアン ASEAN	CPTPP CPTPP	欧州連合 EU	日米 US US◆1
1806.32		Not filled							
	100	1 Chocolate confectionery	10%	10%		10%	For the Pooled Quota Free Other than for the Pooled Quota 10%	3.60%	
		2 Other							
		(1)Containing added sugar	29.8%	35%					
	212	- Chewing gum and other sugar confectionery, foods, containing not less than 50% by weight of sucrose	※1%		※1%	-29.80%	For the Pooled Quota Free Other than for the Pooled Quota ※1%	-10.80%	
		- Other							
	213	-- Foods, the largest single ingredient of which is sugar by weight				29.80%	For the Pooled Quota Free Other than for the Pooled Quota 29.8%	10.80%	
	219	-- Other				29.80%	For the Pooled Quota Free Other than for the Pooled Quota 29.8%	10.80%	
	220	(2)Other	12.5%	25%		21.30%	Free	Free	
1806.90		Other							
	100	1 Chocolate confectionery	10%	10%		10%	For the Pooled Quota Free Other than for the Pooled Quota 10%	3.60%	
		2 Other							
		(1)Food preparations of goods of heading 04.01 to 04.04 containing cocoa powder in a proportion by weight of less than 10%							
		A Containing not less than 30% of natural milk constituents by weight, calculated on the dry matter, excluding whipped cream in pressurized containers	28%＋ 799yen/kg	28%＋ 799yen/kg					

統計番号				関税率		関税率（経済連携協定）			関税率
Statistical code		Description	Tariff rate						
番号 H.S. code			Türkiye	基本 General	暫定 Temporary	アセアン ASEAN	CPTPP CPTPP	欧州連合 EU	日米 US US◆1
	311	- For "the Pooled Quota of other milk products"	21%		21%		5.20%	10.50%	
	319	- Other	23.8%＋ 679yen/kg				23.8%＋ 679yen/kg		
		B Other							
	321	(a)Containing added sugar	23.8%	28%		23.80%	2.90%	3%	
	322	(b)Other	21.3%	25%		21.30%	7.70%	14.50%	
		(2)Other							
		A Containing added sugar	29.8%	35%					
	212	- Chewing gum and other sugar confectionery, foods, containing not less than 50% by weight of sucrose			※1%	-29.80%	For the Pooled Quota Free Other than for the Pooled Quota ※1%	-10.80%	
		- Other							
	213	-- Foods, the largest single ingredient of which is sugar by weight				29.80%	For the Pooled Quota Free Other than for the Pooled Quota 29.8%	10.80%	
	219	-- Other				29.80%	For the Pooled Quota Free Other than for the Pooled Quota 29.8%	10.80%	
	220	B Other	12.5%	25%			7.70%	7.70%	
1704.90		Other							
	230	- White chocolate	25%				9.10%	9.10%	

**2The mark "#" put to certain TPP (CPTPP) rates denotes Reduced rates which are applicable to any goods that are used for special purposes, based on the provisions of Article 9 of the Temporary Tariff Measures Law and of Article 32 of the Cabinet Order for Enforcement of the Temporary Tariff Measures Law.

RELATED LEGAL SYSTEMS, REGULATIONS

Food Sanitation Act
(https://www.mhlw.go.jp/stf/seisakunitsuite/bunya/0000144562.html)

Main items	Regulatory authority	Regulations when importing
Food (confectionery, beverages, etc.) water, food additives, supplements, etc.	Ministry of Health, Labour and Welfare (MHLW)	Notification must be made to MHLW

《Outline》

- **The Food Sanitation Act aims to prevent sanitation hazards resulting from eating and drinking and to ensure food safety thereby protecting citizens' health. The Act also applies to imported foods.**
- **A person who intends to import food, etc. for the purpose of sale or to use in business is obliged to make an import notification from this perspective to ensure food safety, based on Article 27 of the Food Sanitation Act.**
- **Notifications are accepted at the quarantine station, where a food sanitation inspector examines the foods and products to confirm their compliance with the criteria and standards of the Food Sanitation Act, and the necessity of an inspection. (A consultation service is available.)**

《Notification procedures》

(1) Preparing for documents needed for the notification:
- ◆ Notification Form for Importation of Foods, etc.
- ◆ Other documents
  - · Description of raw materials and manufacturing processes (processed foods, etc., as required)
  - · Health (sanitary) certificate (as required)
  - · Test results (as required)

(2) Submit the completed Notification Form and other documentation to the quarantine station responsible for the port of import.

(3) The notification form and other documentation submitted are examined by a food sanitation inspector based on legislation to determine the necessity of inspections.

(4) When the document examination and cargo inspection have found that the cargo conforms to the act (the cargo "passed" the inspection), a "Certificate of Notification" will be returned to the importer from the MHLW quarantine station where the notification was first submitted.

《Recent amendments to Food Sanitation Act》

· To secure food safety against changes in environment surrounding food and food internationalization, the Food Sanitation Act has been amended in 2019 as follows:

(1) Reinforcement of wide-area food poisoning incident response

(2) Institutionalization of sanitation control in compliance with HACCP

(3) Obligation to notify health damage incident caused by intake of their food products containing the designated ingredients or components

(4) Introducing a positive list system for food containers and packaging
Reference of lists:
https://www.mhlw.go.jp/content/11130500/000638983.xlsm
https://www.mhlw.go.jp/content/11130500/000635356.xlsx

(5) Revision of licensing system and establishment of notification system for food business

(6) Obligation to notify food recall information to the government

(7) Further enhancement of import and export food safety certification:

For the purpose to confirm that the inspections and control have properly been conducted in the exporting countries for insurance of safety of imported foods, sanitation control based on HACCP and attachment of sanitation certificates of dairy products or aquatic food are required as a requisite of import.

《Other key points to notify》

- Food additives and pesticide residues are also restricted by the Food Sanitation Law. A positive list is provided here because multiple instances of non-compliance with Japanese food safety laws have been identified among imported food products.
- There are frequent cases where chocolate products are found to be in violation and are banned (deemed ineligible) due to food additives or mycotoxins, therefore caution is required. Cases of violations are being disclosed, including use of undesignated additives, including azorubine, brilliant black (BN), and potassium aluminum silicate, and additives that do not comply with usage standards, including sulfur dioxide and potassium sorbate, and the detection of aflatoxin, a mycotoxin group.

Food additives

- Food additives such as preservatives, sweeteners, colorants, and flavoring agents used in the process of food production or for the purpose of food processing and preservation are also regulated under the Food Sanitation Act. MHLW allows the use of food additives only when they have been judged by the Food Safety Commission as not inflicting any risks on human health, and only after specifying standards for ingredients and criteria for their use. MHLW also strives to ensure the safety of food additives that have been approved for use by, for example, surveying the per capita intake of food additives. See below for the positive list of food additives.

Excel https://www.mhlw.go.jp/content/001031538.xlsx

Pesticide residue

- To ensure that pesticide remained in food not to inflict on human health, MHLW sets the residue standards for all agricultural chemicals, feed additives, and animal drugs. The residue standards are set by the Food Safety Commission for each food within the range of amount not harmful to intake. Any foods with agricultural chemicals, etc. remained at the level surpassing the standard are banned for sale or import by the Food Sanitation Act.

- To ensure that pesticide residues do not exceed standards, the Ministry of Agriculture, Forestry and Fisheries (MAFF) sets standards for use according to the Agricultural Chemicals

Regulation Act in accordance with residue standards. In addition, when food products are imported, they are inspected for pesticide residues at the quarantine station.

For the search on pesticide residue standard values: https://db.ffcr.or.jp/front/

Food Labeling Act (https://www.caa.go.jp/en/policy/food_labeling/)

Main items	Regulatory authority	Measures to take
All food items sold for consumers, etc.	Consumer Affairs Agency	Labeling on container packages in Japanese language

《Labeling details》

- Following nine items are needed to be labeled for foods sold to consumers:

Items to label	Descriptions
1. General name	Indicate common name that expresses the process food contents.
2. Storage condition	Storage condition of the product before opening the package should be indicated in accordance with the characteristics of the food, such as "Store at room temperature out of direct sunlight," "Store at 10°C or below", etc.
3. Use by date or Best before date	Label "use by date" for foods that are quick to deteriorate in quality, while label "best before date" for all other foods.
4. Ingredients used	· Indicate the most common name of raw materials used, in descending order of percentage by weight. · For composite materials that comprise two or more of raw materials, list all materials in descending order of percentage by weight within the parentheses after the composite material name.
5. Additives	Indicate the name of substance for additives, in descending order of percentage by weight, except for those used for nutritious enhancement, processing aids, or those that can be applied to the "carry-over" principle.
6. Content or solid volume and total content	Indicate content weight, content volume, or content quantity. Content weight should be labeled in grams or kilograms, content volume in milliliters or liters, and content quantity in units such as number of pieces.
7. Amount and calorific value of nutrients	For consumer processed foods, calories, amount of protein, fat, carbohydrate, and sodium should be indicated.
8. Name and address of food business operator	Of food business operators, indicate the name and address of the person who is responsible for food labeling descriptions.
9. Location of manufacturing or processing plant and name of manufacturer or processor, etc.	Indicate the location of manufacturing or processing plant and the name of manufacturer or processer. For imported products, indicate the location of the importer's office and the name of the importer.

- In addition to the above, some items need to be indicated if certain requirements are met. The following two items need particular notice.

Items to indicate	Descriptions
Allergen	· Allergen labeling is mandatory for processed foods made from specified raw materials and foods containing additives derived from specified raw materials. · Allergen labeling is recommended for processed foods made from ingredients equivalent to specified raw materials. **Mandatory to label - Specific 8 ingredients:** Shrimp, crab, walnut, wheat, soba (buckwheat), eggs, milk, peanut **Recommended to label – 20 ingredients equivalent to specified raw materials:** Almond, abalone, squid, salmon roe, orange, cashew nut, kiwi fruit, beef, sesame, salmon, mackerel, soybean, chicken, banana, pork, macadamia nut, peach, yam, apples, gelatin
Country of origin	For imported products, name of the country of origin should be indicated.

(Source: "An Introduction of Rule in Japan "Food Labeling Guide" - Aiming for Food Safety and Reliability" by Food Labeling Certification Association, Consumer Affairs Agency)

Market Information

MARKET TRENDS IN RECENT YEARS

<Manufacturing-retail segment in the chocolate market>

- The manufacturing-retail segment in the chocolate market is substantially impacted by sales during the Valentine’s holiday season. In Japan, women give men chocolate on Valentine’s Day (February 14), while men reciprocate on White Day (March 14) by giving women, from whom they received chocolate, candy or marshmallow confections. This custom has long been the norm in Japan. This is not limited to personal relations, including ties between couples, family members and friends. Women in the workplace give chocolate to they male co-workers. This practice has become widely spread for the purpose of showing respect or appreciation to male co-workers. (In Japan, this is referred to as “giri-choco” or obligatory chocolate, or chocolate given to someone who is not a romantic partner.) However, in recent years, companies are eliminating empty formalities such as this, in part owing to an emphasis on gender equality. In particular, the custom of giving “giri-choco” has been on a downfall annually. Meanwhile, women are purchasing high-end chocolate as a reward or treat to themselves. Accordingly, this demand for a “reward/treat” to one’s self is rising. Valentine’s is becoming nothing more than a “chocolate festival.” In Japan, the Valentine’s Day event boasting the highest level of sales is the “Amour du chocolat,” an event put on by JR Tokai Takashimaya. In 2024, the event posted record-high sales of $26,470 thousand USD (photo of the event).

- Owing to the depreciation in the value of the yen versus major currencies in and after 2022, there have been headwinds by imported brand-name chocolates by overseas chocolatiers. At the same time, popularity has grown for the chocolates and chocolate confections created by Japanese pâtissiers (or the companies that employ these pâtissiers) that have won titles/awards at competitions overseas (La Coupe du Monde de la Pâtisserie、WORLD CHOCOLATE MASTERS, etc.).

<Photo of a Valentine’s Day event at JR Nagoya Takashimaya>

(Photo: JR Nagoya Takashimaya news release)

<Distribution segment in the chocolate market>

- In the distribution segment in the chocolate market up to around 2017, there was a trend for cocoa-rich chocolate with a high cacao polyphenol content. This trend dwindled around 2018 and at present has been consolidated into the leading brands. The next trend focused on chocolate that are like a dessert or chocolates that contain Western liquor. However, in 2022-2023, sales of high-end price range chocolate products deteriorated due to price hikes. In 2024, this was topped off with the soaring price of cocoa beans. Reflecting these factors, manufacturers have been increasing development of reasonably-priced products by adding in biscuits, nuts and other ingredients with chocolate and boosting product development of white chocolate products.

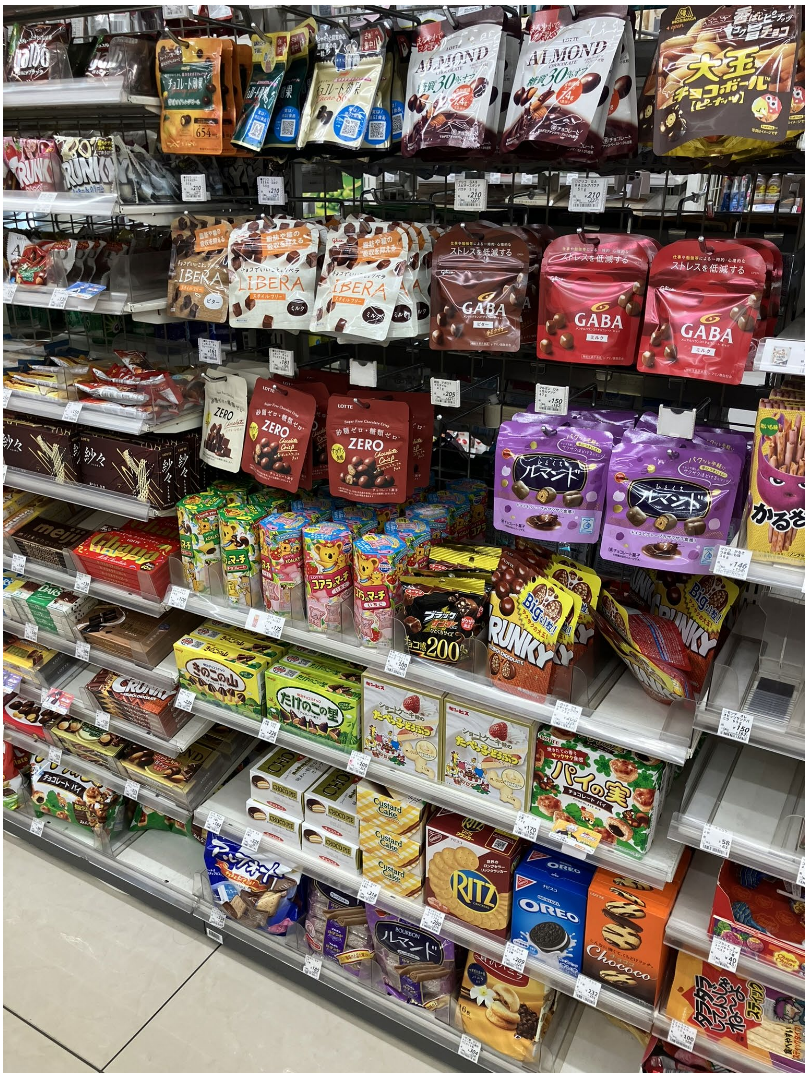
<Chocolate section in supermarkets>

A characteristic is that the chocolate section in supermarkets is rich in variation given its sales floor area is wider than in convenience stores.

(Photo: Taken at a supermarket in Kanagawa Prefecture in September 2024)

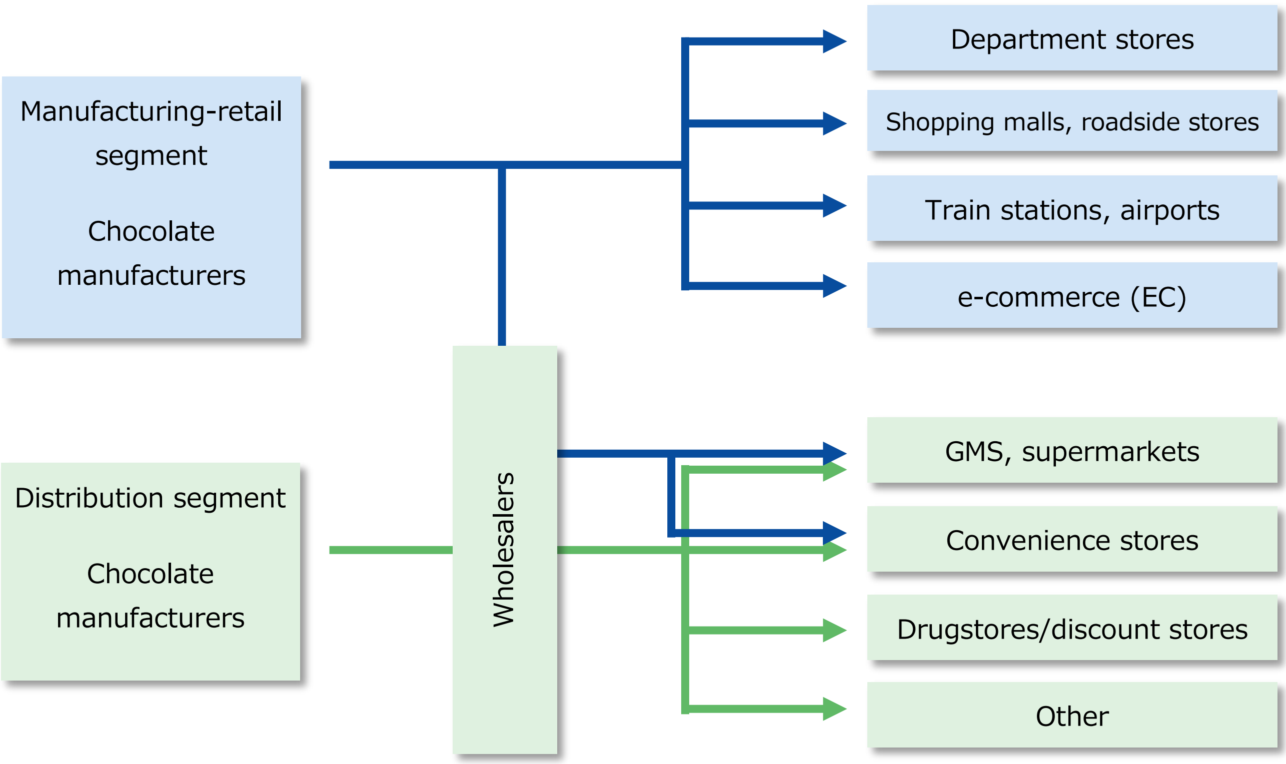
<Chocolate sales section in convenience store>

A characteristic is the broad product lineup of compact size products that can be completely consumed.



(September 2024, photographed inside a convenience store in Tokyo)

DISTRIBUTION, SALES CHANNELS



- **Sales channels for chocolate differ by manufacturers in manufacturing-retail segment and manufacturers in distribution segment. The characteristics of these two segments differ mainly as products in the manufacturing-retail segment are many used for gift purposes, while those products in the distribution segment are for daily consumption. Depending on this, the sales channels and distribution routes differ.**

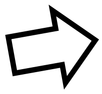
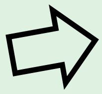
- **The primary sales channels in the manufacturing-retail segment comprise of are department stores, shopping malls, roadside stores, transportation channels including train stations and airports, and e-commerce. During periods when chocolate demand is high, such as the Valentine's Day season, gift chocolates are also sold on some distribution segment channels, including at GMSs, supermarkets and convenience stores. In this case, it is normal that sales are conducted via wholesalers.**

- **The main sales channels conducted by manufacturers in the distribution segment are GMSs, supermarkets, convenience stores, drugstores, and discount stores, and are basically conducted through wholesalers. Given that sales floors at GMSs and supermarkets are spacious, they offer a wide product lineup from bag-type products that contain many pieces per bag to compact size products. Sales floors at convenience stores are narrow and many products deal with the need for immediate consumption. In light of this, convenience stores mainly carry compact size products. A feature of drugstores and discount stores is that many products are sold at a markdown.**

In Japan, brand image tends to be impacted by sales channels. Consequently, manufacturers formulate distribution strategies to ensure that brand image is not eroded.

《Major Chocolate Sales Channels and their Characteristics》

Sales channel	Channel characteristics	Channel growth potential	Sweets sales trends
Department stores	· Sales channel where luxury brands set up stores. Often used when searching for a gift. · In and after 2023, sales have been brisk owing to a recovery in inbound demand. However, as Japanese consumers are shifting to specialty stores, it cannot be denied that this becoming a "sunset industry."	⇨	· Boasts the highest status among confection sales channels. Consequently, many brands are available (manufacturing-retail segment gift products). · Department store sales are trending downward overall, with the exception of inbound sales. Among food sales floors, sales of confections are steady as they are differentiated from other channels.
Shopping malls	· Consists of large-scale tenants, including specialty stores, supermarkets and other shops. There are many customers during the weekend, whereas the are few shoppers on weekdays.	⇨	· Tenants including specialty stores, including GODIVA and Lindt. The format is more casual than that of department stores, therefore the number of brands setting up shop in shopping malls is limited.
Train stations, airports (transportation hubs)	· Wide range of sales, including daily-use items and gifts, bought by users of train stations and airports who are commuting or traveling. On advantage of "EKINAKA," a sales floor located inside a train station once you pass through the ticket gate, offers more convenient access than department stores.	⇨	· In Japan, EKINAKA is becoming popular. It is become a permanent channel for purchasing a small gift or present when going out. This channel is becoming a competing channel against department stores.
GMSs, supermarkets	· GMSs, which offer everything from apparel to daily goods, are shrinking (shifting to becoming a specialty store for apparel and daily items). · Sales at supermarkets, which chiefly offer food items, are not expected to sizably expand but are trending steadily. · Many customers are women in their 40s to 70s.	⇨	· The area of sales floors is wide allowing them to handle a relatively broad range of products, from standard products to new products. · There are also markdown sales but in comparison with drugstores and discount stores, prices are closer to list/retail prices.
Convenience stores	· The core products handled by convenience stores are food items and beverages. Convenience stores are small-scale retail stores that operate around the clock. · This channel conducts few markdown sales and	⇨	· Given that its main demand is for immediate consumption, there many compact-size products. The sales floor is narrow therefore there is a trend to focus on best-sellers. · There are many products that target young consumers.

Sales channel	Channel characteristics	Channel growth potential	Sweets sales trends
	comparatively sells products at list price. · Customers consist mostly of men in their 20s to 40s.		
Drugstores	· Drugstores sell a diverse range of products from OTC drugs to cosmetics, daily goods and food items. · Customers are drawn in with low-priced food sales with the aim of this leading to the sale of high-margin OTC drugs. Owing to this strategy, in the food industry, this channel is recognized as a bargain sales channel. · In recent years, mainly major business operators that manage drugstores are aggressively opening new stores to increase store numbers.		· This channel is on a growth trajectory owing to an increase in the number of stores. · However, given ongoing price hikes, markdown sales are reaching a limit. Going forward, there is a possibility drugstores will increase their appeal of product value, including health benefits.
Discount stores	· Discount stores, such as Don Quijote, are growing thanks to tailwinds from an increase in inbound demand.		· This channel is similar to drugstores as they handle markdown sales. · Shelf displays with a large volume of products that target inbound customers (particularly gummy candy and KitKats).

POSITIONING OF DOMESTIC PRODUCTS AND IMPORTED PRODUCTS

《Top 10 chocolate companies by sales and share in the distribution segment》 (Rows highlighted in light blue are oversea companies/brands)

Sales Trends (Unit: 1,000 USD)

FY2023 Ranking	Company name	Fiscal Year 2018	2019	2020	2021	2022	2023	CAGR 2018-2023
1	Meiji	631,328	642,578	634,637	637,284	655,814	680,961	1.5%
2	Lotte	506,915	525,445	538,019	430,150	450,003	469,856	-1.5%
3	Ezaki Glido	309,377	312,355	289,855	222,355	218,384	236,914	-5.2%
4	Nestlé Japan	178,678	175,369	166,766	172,060	176,692	178,016	-0.1%
5	Morinaga Seika	188,075	174,906	152,207	123,420	124,016	128,119	-7.4%
6	Fujiya	155,317	153,398	150,222	114,486	112,501	118,126	-5.3%
7	Furuta Confectionery	84,707	86,030	86,030	88,015	90,001	95,295	2.4%
8	Meito Sangyo	57,574	56,250	60,287	52,214	57,574	65,515	2.6%
9	Bourbon	39,706	39,706	39,044	38,383	39,706	41,691	1.0%
10	Mars Japan	58,897	58,897	58,897	59,493	26,471	34,412	-10.2%
	Other	418,635	483,026	557,144	555,026	563,563	541,923	5.3%
	Market total	2,629,211	2,707,961	2,733,108	2,492,886	2,514,724	2,590,828	-0.3%

Market Share Transition (Unit: %; percentage points for increase/decrease)

FY2023 Ranking	Company name	Fiscal Year 2018	2019	2020	2021	2022	2023	Market share Incr/Decr* 2018→2023
1	Meiji	24.0	23.7	23.2	25.6	26.1	26.3	2.3
2	Lotte	19.3	19.4	19.7	17.3	17.9	18.1	-1.1
3	Ezaki Glido	11.8	11.5	10.6	8.9	8.7	9.1	-2.6
4	Nestlé Japan	6.8	6.5	6.1	6.9	7.0	6.9	0.1
5	Morinaga Seika	7.2	6.5	5.6	5.0	4.9	4.9	-2.2
6	Fujiya	5.9	5.7	5.5	4.6	4.5	4.6	-1.3
7	Furuta Confectionery	3.2	3.2	3.1	3.5	3.6	3.7	0.5
8	Meito Sangyo	2.2	2.1	2.2	2.1	2.3	2.5	0.3
9	Bourbon	1.5	1.5	1.4	1.5	1.6	1.6	0.1
10	Mars Japan	2.2	2.2	2.2	2.4	1.1	1.3	-0.9
	Other	15.9	17.8	20.4	22.3	22.4	20.9	5.0

(Includes estimates by Yano Research Institute)

- Japanese manufacturers possess a high share of the distribution segment in the chocolate market. Overseas companies that rank among the top 10 chocolate manufacturers are Nestlé Japan Ltd. and Mars Japan Ltd. "KitKat," which is a product of Nestlé Japan, is not only popular among Japanese consumers but also among foreign tourists visiting Japan. This was tailwind to sales in FY2022-2023. Sales at Mars Japan substantially declined in 2022 due to a product recall and suspension of sales of "SNICKERS" due to contamination by a foreign matter.

- In addition to the above, imported chocolate brands sold mainly at supermarkets include "Hershey's," (Suzusho), "Lindt, (Mitsubishi Shokuhin) and "FERRERO ROCHER" (NIS FOODS). "KitKat," "SNICKERS," and "M&M's" are sold in the same sales floor as chocolate products made by Japanese manufacturers therefore the size of sales for these products is large. Other imported chocolates are sold primarily at imported confection corners at high-end supermarkets, or at luxury supermarket that handle many imported food products. Given the sales floor is limited in size, the share of the distribution segment in the chocolate market is small.

《Top 5 chocolate companies by sales and share in the manufacturing-retail segment》(Rows highlighted in light blue are oversea companies/brands)

Sales Trends (Unit: 1,000 USD)

FY2022		Fiscal Year					CAGR
Ranking	Company name	2018	2019	2020	2021	2022	2018-2022
1	Godiva	115,810	115,148	103,236	104,560	113,163	-0.5%
2	Mary Chocolate	98,286	95,692	83,251	90,881	101,913	0.7%
3	Morozoff	56,416	55,754	49,037	49,633	52,776	-1.3%
4	Mon Loire	36,159	40,103	37,211	38,383	43,796	3.9%
5	Goncharoff	35,736	34,525	27,940	25,445	25,630	-6.4%
Other		306,128	313,268	266,462	270,148	291,404	-1.0%
Market total		648,534	654,490	567,137	579,048	628,681	-0.6%

Market Share Transition (Unit: %; percentage points for increase/decrease)

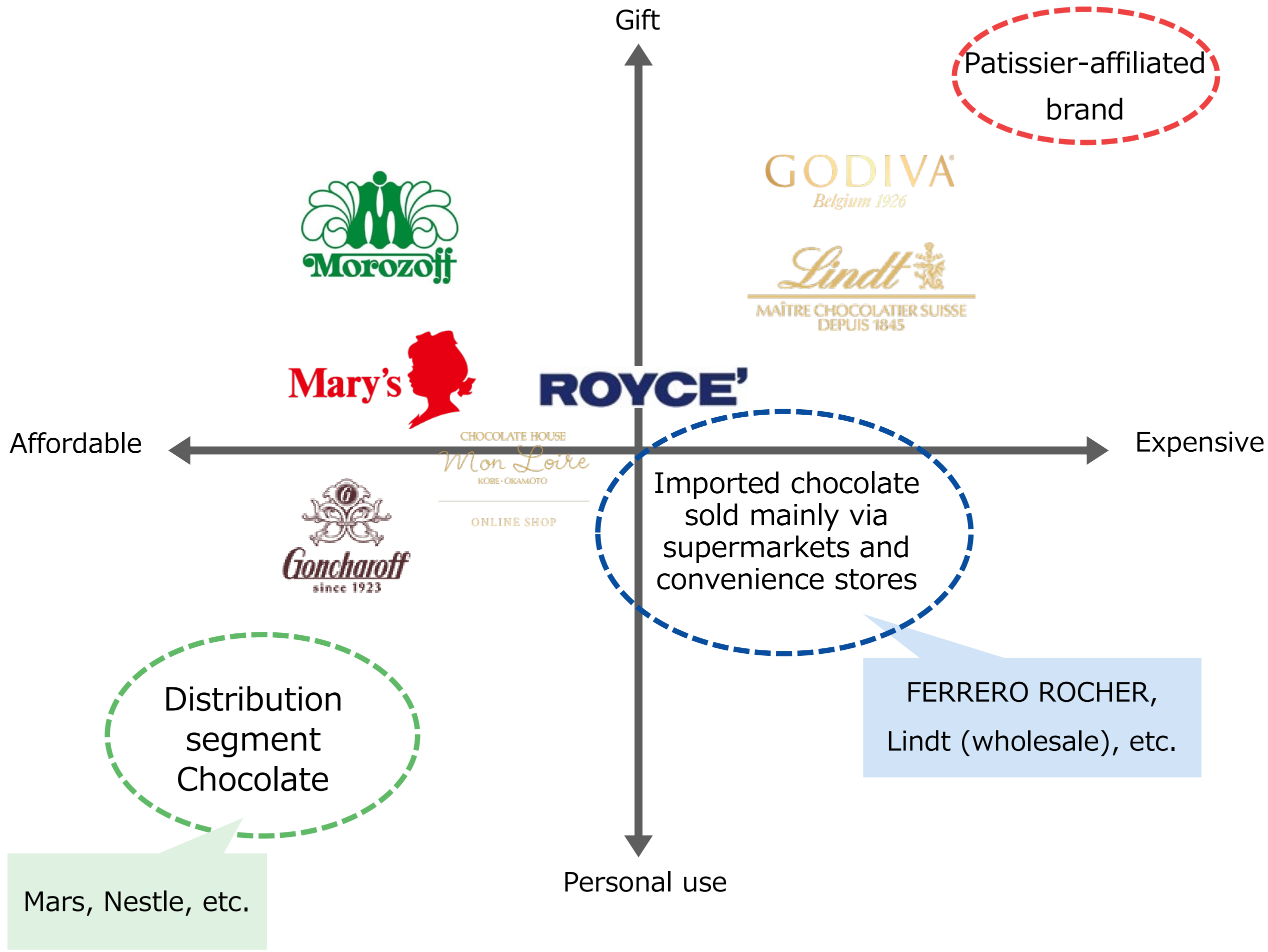
FY2022		Fiscal Year					Market share Incr/Decr*
Ranking	Company name	2018	2019	2020	2021	2022	2018-2022
1	Godiva	17.9	17.6	18.2	18.1	18.0	0.1
2	Mary Chocolate	15.2	14.6	14.7	15.7	16.2	1.1
3	Morozoff	8.7	8.5	8.6	8.6	8.4	-0.3
4	Mon Loire	5.6	6.1	6.6	6.6	7.0	1.4
5	Goncharoff	5.5	5.3	4.9	4.4	4.1	-1.4
Other		47.2	47.9	47.0	46.7	46.4	-0.9

(Includes estimates by Yano Research Institute)

- Products in the manufacturing-retail segment in the chocolate market are often purchased as a gift. In sales, Godiva Japan, Inc. (estimate is solely for chocolate) appears to rank No. 1. Among domestic manufacturers, Mary Chocolate Co., Ltd. (https://www.mary.co.jp/mary/) and Morozoff Limited (https://www.morozoff.co.jp/) are among leading companies. In recent years, Mon Loire (https://www.monloire.co.jp/ec/shop/) has been increasing its store number. Moreover, Lindt (https://www.lindt.jp/), Wittamer (https://www.wittamer.jp/) and Demel (https://demel.co.jp/) have earned a certain degree of recognition as a chocolate brand for gifts and acquired a certain scale.

- Lindt is divided into wholesale sales to supermarkets and convenience stores, and directly-managed stores and e-commerce. Mitsubishi Shokuhin handles wholesale operations, and LINDT & SPRUNGLI JAPAN operates directly-managed stores and e-commerce.

Positioning Map for Chocolate



*Logos: Taken from each website

(Prepared by Yano Research Institute)

- In Japan, the size of sales and brand strength are not necessarily proportional. If anything, there is a tendency to recognize that "a high degree of scarcity equals a high brand value." In recent years, a chocolate brand affiliated with a pâtissier that has won an award at an international competition is seen as having a high degree of scarcity therefore consumers recognize it as having high brand strength.

- Morozoff, Mary's and Goncharoff have the image of being casual and in a low-price range in comparison with other gift brands given their business operations are widely deployed, to a certain extent, including wholesale to GMSs. Mon Loire is expanding sales at transportation hubs, which includes train stations. These products are mainly eaten at home or given as a casual gift. ROYCE has a strong product image of being made in Hokkaido. In light of this, among gift products, it is mainly given as a casual souvenir from a trip to Hokkaido or to be eaten at home by the consumer. GODIVA and Lindt (directly-managed stores/EC) have a high level of recognition in Japan as high-end chocolate brands. Consumers recognize them as brands suited for a wide range of daily scenes, such as a reward to oneself.

- There are many GODIVA stores. Lindt also has a relatively extensive sales channel. Consequently, these are recognized as luxury brands but also seen as brands that are scarce. In recent years, at Valentine’s Day events in Japan, focus tends to be on popular brands mainly collections developed by a pâtissier that has won an award at an international competition. Japanese chefs that boast a high level of popularity every year, include CLUB HARIE, es Koyama, chez Shibata, Toshi Yoroizuka, LE CHOCOLAT DE H, and pâtisserie Sadaharu AOKI paris. Among overseas brands, LE CHOCOLAT ALAIN DUCASSE, PIERRE MARCOLINI, La Maison du Chocolat, and JEAN-PAUL HÉVIN JAPON have a high level of recognition while also showcasing a number of stores. For this reason, these chocolatiers retain their value for being a scarce product. All of these are popular brands at Valentine’s Day events and as gifts.

CHARACTERISTICS OF MAJOR PRODUCTS & TOP-SELLING PRODUCTS

es koyama		2024 Valentine’s Day limited collection 4 pieces $12.2 USD (tax included), etc.	Directly-managed stores, EC, department stores, etc.
GODIVA		Classic Gold collection 12 pieces $21.4 USD (tax included), etc.	Department stores, train stations, shopping malls, EC, etc.
Lindt		Lindor gift box 10 pieces $11.9 USD (tax included), etc.	Shopping malls, director-managed stores, EC, etc.
		Lindor milk pack 5 pieces $4.6 USD (tax included) (Reference retail price)	Supermarkets, convenience stores, etc. (Wholesale by Mitsubishi Shokuhin)
FERRERO ROCHER		FERRERO ROCHER 8 pieces $3.9 USD (tax included) (Reference retail price)	Supermarkets, convenience stores (Wholesale by NIS FOODS)

Morozoff		Premium Chocolate Selection 10 pieces $7.9 USD (tax included)	Department stores, shopping malls, train stations, EC, etc.
Mary's		Fancy chocolate 12 pieces $4.3 USD (tax included)	Department stores, shopping malls, train stations, GMS, supermarkets, etc.
Nestle KitKat		KitKat mini MATCHA Pack of $69.8 USD (tax included)	Mass retailers, convenience stores、drugstores, discount stores, etc.
SNICKERS M&M's	 	SNICKERS $152 USD (tax included) M&M's $1.0 USD (tax included)	Mass retailers, convenience stores、drugstores, discount stores, etc.

*Photos: Taken from websites of each company

MAJOR IMPORTERS

■ Mitsubishi Shokuhin Co., Ltd. (https://www.mitsubishi-shokuhin.com/en/)

Mitsubishi Shokuhin Co., Ltd., a wholly-owned subsidiary of Mitsubishi Corporation, is a major general food wholesaler. The company purchases merchandise from food manufacturers in Japan and sells them wholesale to GMSs, supermarkets, convenience stores, drugstores, and discount stores. In addition to this, the company is also deploying the wholesale of imported confections purchased from overseas manufacturers (imported confections business). The main chocolate brand it imports is Lindt (June 2023 onward) but is also taking on the import and sales of other candy brands other than chocolate, including HARIBO, Walkers and Ricola.

■ SUZUSHO LTD. (https://www.suzusho.co.jp/)

Suzusho is a trading company that is a long-established importer of imported foods and confections, primarily brands from the United States and Europe. Chocolate products include brands such as Hershey's, Brookside, TimTam (April 2024 onward), Socado, ALTERECO, and Andes. In addition to this, the company also imports Tengu beef jerky, Frito Lay chips, Clipper (teas), Swiss Miss (cocoa) and Familia (cereal).

■NIS Foods Service Corporation (https://www.nis.co.jp/)

NIS Foods is a member of the ITOCHU Group. As a subsidiary of Nippon Access, Inc. (comprehensive food wholesaler), NIS Foods engages in the import and sales of confections and food products. The company imports the chocolate brands FERRERO ROCHER, Cadbury, Toblerone, and COTE DOR. Aside from chocolate, the company imports and sells brands such as Nutella, SKIPPYR, Lotus Biscoff and Melissa.

■EIM CO.,LTD.（https://www.eim.co.jp/）

The pillar of the wholesale business is the import of confections from the United States and countries in Europe and wholesale to distributors in Japan. In addition, the company not only imports and sells final products, but also tackles activities that involve the repackaging of products imported in bulk and commercializes them using an original package design. Imported chocolate brands EIM is deploying include HAMLET, Walker's Nonsuch (toffee), LACASA, VILLARS, and VANINI. Confection brands, aside from chocolate products, include DAELMANS (waffle cookies), THE LORENZ BAHLSEN (snacks), GOULIBEUR (short breads), Yupi, and Fini (gummy candies).

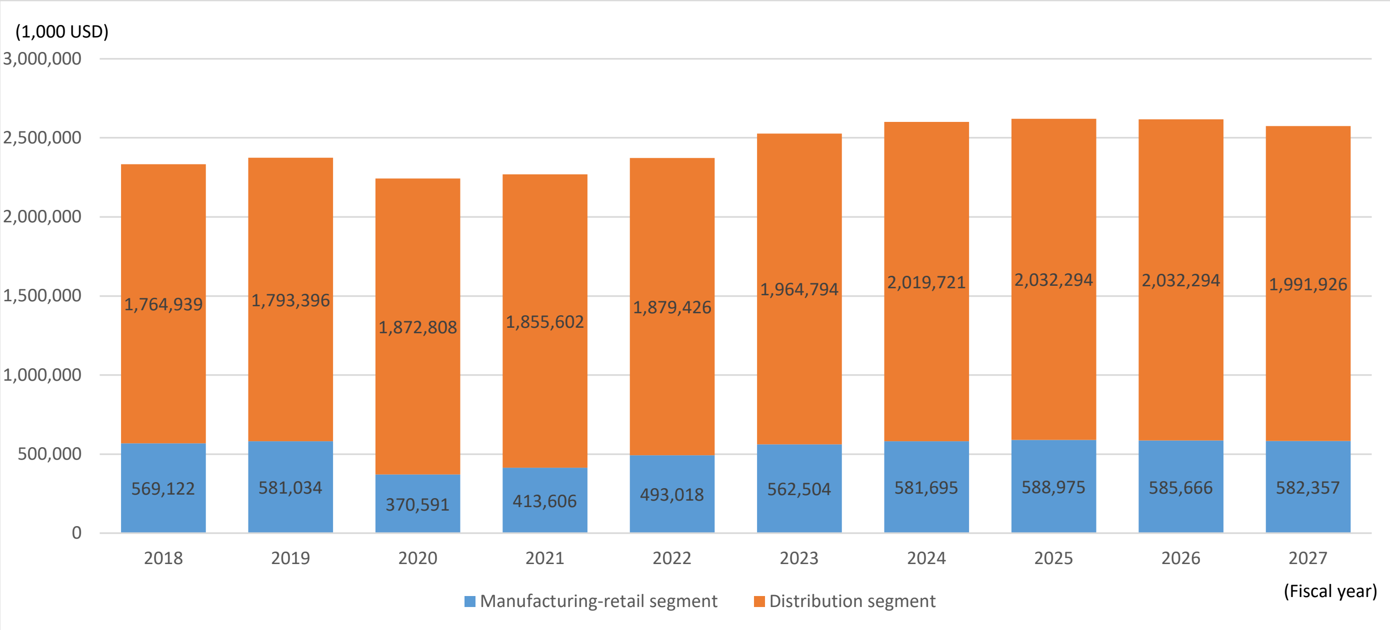
3. Biscuits

Key points of the market trend and characteristics

- **The biscuit market in Japan is divided into the manufacturing-retail segment and the distribution segment, depending on the distribution format. Popular products that are sold through the manufacturing-retail segment are cookies that come in designed tins and langue de chat, which are often used as souvenir gifts at sightseeing spots. All tinned biscuits were popular until 2022, but the rise in commodity prices has led consumers to buy tasty products on their own, and only the cute tins have lost their appeal.**
- **In the distribution segment, biscuits that are combined with chocolate sell well. By combining biscuits with chocolate, the products cost less than the products solely made of chocolate, which is sold in both the biscuits and for chocolate aisles.**
- **Imported biscuits such as “Walkers” are partly sold in supermarkets as a distribution segment, but they account for a small percentage of the total biscuit market. This is because there is no clear differentiation from the domestic products, and the specification of overseas products (content volume, size) does not meet the domestic market demand. It is difficult to expand the distribution in Japan unless companies import in bulk and repackage into smaller, individual packages.**
- **When it comes to biscuit texture, crispiness is preferred over crunchiness (hardness) in both the manufacturing-retail segment and the distribution segment.**

Market Size

MARKET SIZE TRANSITION (By VALUE, FY2018-2027)



(Unit:1,000 USD)	Fiscal Year										CAGR
	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2018-2027
Biscuits total	2,334,061	2,374,429	2,243,399	2,269,208	2,372,444	2,527,298	2,601,416	2,621,269	2,617,960	2,574,284	1.1%
Year-on-Year	100.7	101.7	94.5	101.2	104.5	106.5	102.9	100.8	99.9	98.3	
Manufacturing-retail segment	569,122	581,034	370,591	413,606	493,018	562,504	581,695	588,975	585,666	582,357	0.3%
Year-on-Year	101.9	102.1	63.8	111.6	119.2	114.1	103.4	101.3	99.4	99.4	
Distribution segment	1,764,939	1,793,396	1,872,808	1,855,602	1,879,426	1,964,794	2,019,721	2,032,294	2,032,294	1,991,926	1.4%
Year-on-Year	100.5	101.6	104.4	99.1	101.3	104.5	102.8	100.6	100.0	98.0	

*The figures for FY2024 and beyond are the forecasts.

(Estimated by Yano Research Institute)

- The biscuit market in Japan is divided into the manufacturing-retail segment and distribution segment, depending on the distribution format.
- In the manufacturing-retail segment, many Japanese manufacturers of Western sweets have developed cookie and biscuit products as part of their product lineup. In recent years, cookies that come in designed tins are popular as gifts. Langue de chat is popular among tourist souvenirs. The selling price of cookies that come in a tin have risen due to the soaring cost of raw materials and tins (cans). There is a growing gap between briskly selling and meagerly selling products, including rapidly selling cookies that come in designed tins, which are not only cute, but retain their intrinsic deliciousness.
- The distribution segment, in addition to brands such as Bourbon (https://www.bourbon.co.jp/) and Fujiya (https://www.fujiya-peko.co.jp/sweets/) which are supplied to supermarkets and convenience stores through wholesalers, also includes imported sweets, such as Walkers and Lotus, which are sold in imported food specialty stores and imported sweet corners in supermarkets. During the global pandemic in the years in and after FY2020, there was an increase in situations where people were eating biscuits while working from home. Since then, biscuit sales have remained solid. Also, from FY2024, in tandem with

the rise in chocolate prices, demand have been flowing into products that are a combination of chocolate and biscuits owing to their comparatively reasonable pricing. For the time being, we estimate demand will continue to flow into these products.

- Imported biscuits are sold in imported food specialty stores and in imported sweets corners at supermarkets, as opposed to general sales floors where the products of Japanese manufacturers are located. It is difficult to differentiate imported biscuits from those of Japanese manufacturers. However, the selling prices are more expensive than those of their Japanese counterparts. Even now, in Japan these imported sweets are recognized as being a type of cookie or biscuit, including shortbread. Although the category of shortbread is not very well known in Japan.

- Due to a shortage of chicken eggs, including liquid eggs, reflecting the spread of the avian flu in January-June 2023, many manufacturers in Japan were forced to suspended sales of some products.

<Examples of typical biscuits in Japan>

Cookies that come in a tin from CAFÉ TANAKA 	*Shiroi-koibito* from ISHIYA Co., Ltd. (Langue de chat) 	Morinaga & Co., Ltd. biscuit series 	Walkers (Imported by Mitsubishi Shokuhin) 
Gift	Souvenir sweets (Hokkaido)	Sweets that are sold retail after being sold wholesale by the manufacturer	Imported sweets

TRANSITION OF TOTAL IMPORT SIZE PER COUNTRY (HS CODE-BASED; FY2018 TO FY2023; VALUE & VOLUME)

《Import value transition》

FY2023	Unit:(1,000 USD)	Fiscal Year						CAGR
Ranking	Country name	2018	2019	2020	2021	2022	2023	2018-2023
1	China	73,200	75,293	67,290	77,422	94,315	94,916	5.3%
2	Malaysia	36,457	37,823	40,712	37,855	54,520	64,094	11.9%
3	France	17,855	24,442	24,976	38,965	49,700	49,280	22.5%
4	United States	29,023	27,976	24,565	36,616	46,601	45,350	9.3%
5	Vietnam	16,289	18,156	19,258	19,979	29,529	33,020	15.2%
6	Netherlands	10,550	7,390	10,000	13,404	17,172	21,816	15.6%
7	Italy	13,014	15,647	18,073	20,794	22,095	20,431	9.4%
8	Belgium	10,370	11,077	13,408	16,140	18,279	19,505	13.5%
9	South Korea	7,101	9,772	10,288	15,491	19,016	18,617	21.3%
10	Thailand	19,764	20,286	17,443	17,425	17,081	18,269	-1.6%
11	Indonesia	11,218	12,370	14,093	16,902	24,346	15,416	6.6%
12	Spain	3,060	3,344	6,437	12,961	13,236	14,193	35.9%
13	United Kingdom	4,610	5,173	5,663	7,815	8,407	10,040	16.8%
14	Germany	4,075	4,104	4,106	6,548	7,080	7,985	14.4%
15	Singapore	3,290	4,346	3,259	5,601	6,117	6,951	16.1%
16	Canada	4,038	4,857	4,572	5,279	5,556	6,856	11.2%
17	Taiwan	4,032	3,770	3,850	4,669	5,729	6,037	8.4%
18	Australia	2,327	2,516	3,080	2,805	3,042	3,306	7.3%
19	Philippines	1,948	2,424	1,497	1,957	3,043	3,025	9.2%
20	Portugal	1,594	1,429	1,593	2,115	1,688	2,788	11.8%
21	New Zealand	978	578	146	96	628	2,315	18.8%
22	Lithuania	573	731	1,001	1,621	1,699	1,921	27.4%
23	Denmark	1,394	1,241	994	1,326	1,673	1,801	5.3%
24	Switzerland	2,175	1,432	881	833	1,122	1,694	-4.9%
25	Türkiye	888	1,961	841	822	1,097	1,265	7.3%
	Other	6,717	6,124	7,281	10,378	11,764	11,179	10.7%
	Total	286,540	304,263	305,310	375,820	464,535	482,070	11.0%
	Year-on-Year (%)	104.2	106.2	100.3	123.1	123.6	103.8	

*Share of top 25 countries: 97.7% (FY2023)

· In FY2023, the value of biscuit imports totaled $482,070 thousand USD (a rise of 3.8% year-on-year). China ranked 1st in biscuit imports to Japan by value (share of total biscuit imports to Japan was 19.7%), Malaysia ranked 2nd (13.3% share), and France ranked 3rd (10.2% share). In FY2023, the import value for Türkiye was $1,265 thousand USD, putting 25th, putting its share of total biscuit imports to Japan at 0.3%.

《Import volume transition》

FY2023 Ranking	Unit: (ton) Country name	Fiscal Year 2018	2019	2020	2021	2022	2023	CAGR 2018-2023
1	China	31,064	32,581	30,879	31,657	31,709	31,387	0.2%
2	Malaysia	10,964	11,750	13,195	12,242	13,933	14,250	5.4%
3	United States	11,247	10,666	10,794	11,134	11,178	9,954	-2.4%
4	Vietnam	6,763	7,347	7,712	7,486	8,273	8,267	4.1%
5	France	3,646	6,224	5,714	7,531	7,468	6,076	10.8%
6	Indonesia	6,218	6,639	7,377	7,320	7,983	5,545	-2.3%
7	South Korea	1,934	2,695	3,138	4,681	4,862	4,254	17.1%
8	Thailand	6,307	6,522	5,782	5,188	4,462	4,134	-8.1%
9	Belgium	3,628	4,215	4,747	4,950	4,087	3,860	1.2%
10	Italy	3,344	4,033	4,107	5,490	4,905	3,653	1.8%
11	Spain	1,276	1,342	2,139	3,553	2,671	2,610	15.4%
12	Netherlands	1,709	1,305	1,503	2,012	1,910	2,098	4.2%
13	Canada	1,188	1,545	1,487	1,545	1,329	1,433	3.8%
14	Germany	1,276	1,297	1,213	1,818	1,385	1,305	0.5%
15	Taiwan	1,213	1,052	1,158	1,130	1,191	1,187	-0.4%
16	United Kingdom	719	846	875	1,252	1,198	1,143	9.7%
17	Singapore	640	839	631	961	796	849	5.8%
18	Australia	526	634	697	624	662	646	4.2%
19	Portugal	525	497	504	579	430	493	-1.3%
20	Lithuania	246	314	451	595	532	480	14.3%
21	Türkiye	409	607	230	286	315	315	-5.1%
22	Phillipines	353	388	219	216	248	303	-3.0%
23	India	120	221	184	271	232	287	19.0%
24	New Zealand	270	163	38	16	125	278	0.6%
25	Brazil	280	280	280	338	254	257	-1.8%
	Other	2,066	1,815	2,390	3,135	2,530	2,215	1.4%
	Total	97,930	105,815	107,445	116,011	114,665	107,279	1.8%
	Year-on-Year (%)	103.8	108.1	101.5	108.0	98.8	93.6	

*Share of top 25 countries: 97.9% (FY2023)

· In FY2023, the import volume of biscuits stood at 107,279 tons (a decline of 6.4% year-on-year). Ranked based on biscuit import volume, China was 1st (share of 29.3%), Malaysia was

2nd (share of 13.3%) and the United States was 3rd (share of 9.3%). On a volume basis, countries in Asia, including Indonesia, Vietnam and South Korea, trended upward into the realm of top-ranking importers of biscuits to Japan, as opposed to their standing on a value-basis.

- For biscuit import volume in FY2023, Türkiye ranked 21st, with 315t and a share of 0.3%.

《Unit price transition》

	Fiscal year						CAGR
	2018	2019	2020	2021	2022	2023	2018-2023
Unit price (US$/kg)	**2.9**	**2.9**	**2.8**	**3.2**	**4.1**	**4.5**	**9.0%**
Y-o-Y (%)	**1.0**	**1.0**	**1.0**	**1.1**	**1.3**	**1.1**	

- The unit price of biscuits had almost stayed flat until 2020 at around $2.8 to 2.9 USD/kg and rose to $3.2 USD/kg in 2021. It further increased in 2022 and beyond. CAGR of the price from 2018 onward is 9.0%, which is explained by such factors as rising of price in overseas, increased transportation costs, yen depreciation, etc.

Key Information for Exporting to Japan

TARIFFS (HS CODE-BASED)

*General or Temporary rate shall be applied unless a specific tariff rate is shown in the tables below.

Statistical code		Description	Tariff rate						
H.S. code			Türkiye	General	Temporary	ASEAN	CPTPP	EU	US
19.05		Bread, pastry, cakes, biscuits and other bakers' wares, whether or not containing cocoa; communion wafers, empty cachets of a kind suitable for pharmaceutical use, sealing wafers, rice paper and similar products							
1905.10	000	Crispbread	4.5%	12%		9%	3.20%	3.30%	3.20%
1905.20	000	Gingerbread and the like	9%	30%		9%	6.50%	6.50%	6.50%
		Sweet biscuits;, waffles and wafers :							
1905.31	000	Sweet biscuits	20.4%	24%		20.40%	7.40%	7.40%	
1905.32	000	Waffles and wafers	15%	30%		15%	4%	4%	4%
1905.40	000	Rusks, toasted bread and similar toasted products	4.5%	12%		9%	1.10%	1.10%	1.10%
1905.90		Other							
	100	1 Bread, ship's biscuits and other ordinary bakers' wares, not containing added sugar, honey, eggs, fats, cheese or fruit	9%	12%			1.10%	1.10%	1.10%
	200	2 Communion wafers, empty cachets of a kind suitable for pharmaceutical use, sealing wafers, rice paper and similar products	6%	6.40%			2.10%	2.20%	
		3 Other							
		(1) Containing added sugar							
	311	A Arare, Senbei and similar rice products	34%	40%			32.30%		
	312	B Biscuits, cookies and crackers	15%	24%		15%	Free	Free	Free
	314	C Crisp savoury food products, made from a dough based on potato powder	9%	9.60%		5%	Free	Free	Free

Statistical code		Description	Tariff rate						
H.S. code			Türkiye	General	Temporary	ASEAN	CPTPP	EU	US
		D Other		30%					
	313	- Pizza, chilled or frozen	24%			15%	5.30%	5.30%	5.30%
	319	- Other	25.5%			15%	Free	Free	Free
		(2) Other							
	321	A Arare, Senbei and similar rice products	29.8%	35%			28.30%		
	322	B Biscuits, cookies and crackers	13%	20%		13%	Free	Free	Free
	323	C Crisp savoury food products, made from a dough based on potato powder	9%	9.60%		5%	Free	Free	Free
	329	D Other	12.5%	25%		12.50%	Free	Free	Free

RELATED LEGAL SYSTEMS, REGULATIONS

Food Sanitation Act

(https://www.mhlw.go.jp/stf/seisakunitsuite/bunya/0000144562.html)

Main items	Regulatory authority	Regulations when importing
Food (confectionery, beverages, etc.) water, food additives, supplements, etc.	Ministry of Health, Labour and Welfare (MHLW)	Notification must be made to MHLW

《Outline》

- **The Food Sanitation Act aims to prevent sanitation hazards resulting from eating and drinking and to ensure food safety thereby protecting citizens' health. The Act also applies to imported foods.**
- **A person who intends to import food, etc. for the purpose of sale or to use in business is obliged to make an import notification from this perspective to ensure food safety, based on Article 27 of the Food Sanitation Act.**
- **Notifications are accepted at the quarantine station, where a food sanitation inspector examines the foods and products to confirm their compliance with the criteria and standards of the Food Sanitation Act, and the necessity of an inspection. (A consultation service is available.)**

《Notification procedures》

(1) Preparing for documents needed for the notification:

- Notification Form for Importation of Foods, etc.
- Other documents
  - Description of raw materials and manufacturing processes (processed foods, etc., as required)
  - Health (sanitary) certificate (as required)
  - Test results (as required)

(2) Submit the completed Notification Form and other documentation to the quarantine station responsible for the port of import.

(3) The notification form and other documentation submitted are examined by a food sanitation inspector based on legislation to determine the necessity of inspections.

(4) When the document examination and cargo inspection have found that the cargo conforms to the act (the cargo "passed" the inspection), a "Certificate of Notification" will be returned to the importer from the MHLW quarantine station where the notification was first submitted.

《Recent amendments to Food Sanitation Act》

- To secure food safety against changes in environment surrounding food and food internationalization, the Food Sanitation Act has been amended in 2019 as follows:

(1) Reinforcement of wide-area food poisoning incident response

(2) Institutionalization of sanitation control in compliance with HACCP

(3) Obligation to notify health damage incident caused by intake of their food products containing the designated ingredients or components

(4) Introducing a positive list system for food containers and packaging
Reference of lists:
https://www.mhlw.go.jp/content/11130500/000638983.xlsm
https://www.mhlw.go.jp/content/11130500/000635356.xlsx

(5) Revision of licensing system and establishment of notification system for food business

(6) Obligation to notify food recall information to the government

(7) Further enhancement of import and export food safety certification:

For the purpose to confirm that the inspections and control have properly been conducted in the exporting countries for insurance of safety of imported foods, sanitation control based on HACCP and attachment of sanitation certificates of dairy products or aquatic food are required as a requisite of import.

《Other key points to notify》

- Food additives and pesticide residues are also restricted by the Food Sanitation Law. A positive list is provided here because multiple instances of non-compliance with Japanese food safety laws have been identified among imported food products.

- There are frequent cases where biscuits are found to be in violation and are banned (deemed ineligible) due to food additives or mycotoxins, therefore caution is required. In particular, in FY2023, biscuits imported from Türkiye were found to contain TBHQ, an undesignated additive, and were found not to follow standards for sulfur dioxide use. Consequently, they were ordered to be destroyed, therefore caution is required. TBHQ is used in various countries as an antioxidant, including for fats and oils. In Japan, it is an undesignated additive and therefore not authorized for use.

Food additives

- Food additives such as preservatives, sweeteners, colorants, and flavoring agents used in the process of food production or for the purpose of food processing and preservation are also regulated under the Food Sanitation Act. MHLW allows the use of food additives only when they have been judged by the Food Safety Commission as not inflicting any risks on human health, and only after specifying standards for ingredients and criteria for their use. MHLW also strives to ensure the safety of food additives that have been approved for use by, for example, surveying the per capita intake of food additives. See below for the positive list of food additives.

Excel https://www.mhlw.go.jp/content/001031538.xlsx

Pesticide residue

- To ensure that pesticide remained in food not to inflict on human health, MHLW sets the residue standards for all agricultural chemicals, feed additives, and animal drugs. The residue standards are set by the Food Safety Commission for each food within the range of amount not harmful to intake. Any foods with agricultural chemicals, etc. remained at the level surpassing the standard are banned for sale or import by the Food Sanitation Act.

- To ensure that pesticide residues do not exceed standards, the Ministry of Agriculture, Forestry and Fisheries (MAFF) sets standards for use according to the Agricultural Chemicals Regulation Act in accordance with residue standards. In addition, when food products are imported, they are inspected for pesticide residues at the quarantine station.

For the search on pesticide residue standard values: https://db.ffcr.or.jp/front/

Food Labeling Act (https://www.caa.go.jp/en/policy/food_labeling/)

Main items	Regulatory authority	Measures to take
All food items sold for consumers, etc.	Consumer Affairs Agency	Labeling on container packages in Japanese language

《Labeling details》

- Following nine items are needed to be labeled for foods sold to consumers:

Items to label	Descriptions
1. General name	Indicate common name that expresses the process food contents.
2. Storage condition	Storage condition of the product before opening the package should be indicated in accordance with the characteristics of the food, such as "Store at room temperature out of direct sunlight," "Store at 10°C or below", etc.
3. Use by date or Best before date	Label "use by date" for foods that are quick to deteriorate in quality, while label "best before date" for all other foods.
4. Ingredients used	· Indicate the most common name of raw materials used, in descending order of percentage by weight.

	· For composite materials that comprise two or more of raw materials, list all materials in descending order of percentage by weight within the parentheses after the composite material name.
5. Additives	Indicate the name of substance for additives, in descending order of percentage by weight, except for those used for nutritious enhancement, processing aids, or those that can be applied to the "carry-over" principle.
6. Content or solid volume and total content	Indicate content weight, content volume, or content quantity. Content weight should be labeled in grams or kilograms, content volume in milliliters or liters, and content quantity in units such as number of pieces.
7. Amount and calorific value of nutrients	For consumer processed foods, calories, amount of protein, fat, carbohydrate, and sodium should be indicated.
8. Name and address of food business operator	Of food business operators, indicate the name and address of the person who is responsible for food labeling descriptions.
9. Location of manufacturing or processing plant and name of manufacturer or processor, etc.	Indicate the location of manufacturing or processing plant and the name of manufacturer or processer. For imported products, indicate the location of the importer's office and the name of the importer.

- In addition to the above, some items need to be indicated if certain requirements are met. The following two items need particular notice.

Items to indicate	Descriptions
Allergen	· Allergen labeling is mandatory for processed foods made from specified raw materials and foods containing additives derived from specified raw materials. · Allergen labeling is recommended for processed foods made from ingredients equivalent to specified raw materials. **Mandatory to label - Specific 8 ingredients:** Shrimp, crab, walnut, wheat, soba (buckwheat), eggs, milk, peanut **Recommended to label – 20 ingredients equivalent to specified raw materials:** Almond, abalone, squid, salmon roe, orange, cashew nut, kiwi fruit, beef, sesame, salmon, mackerel, soybean, chicken, banana, pork, macadamia nut, peach, yam, apples, gelatin
Country of origin	For imported products, name of the country of origin should be indicated.

(Source: "An Introduction of Rule in Japan "Food Labeling Guide" - Aiming for Food Safety and Reliability" by Food Labeling Certification Association, Consumer Affairs Agency)

Market Information

MARKET TRENDS IN RECENT YEARS

《Market size transition and forecast by biscuit type》

(Unit: 1,000 USD)	Fiscal Year										CAGR
	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2018-2027
Manufacturing-retail segment	569,122	581,034	370,591	413,606	493,018	562,504	581,695	588,975	585,666	582,357	0.3%
Cookies, biscuits	418,238	422,209	297,796	327,576	360,664	403,679	422,871	423,533	423,533	423,533	0.1%
Langue de chat cookies	150,883	158,825	72,795	86,030	132,354	158,825	158,825	165,442	162,134	158,825	0.6%
Distribution segment	1,764,939	1,793,396	1,872,808	1,855,602	1,879,426	1,964,794	2,019,721	2,032,294	2,032,294	1,991,926	1.4%
Japanese manufacturers	1,707,365	1,733,836	1,819,866	1,798,028	1,806,631	1,896,632	1,953,544	1,972,735	1,972,735	1,932,367	1.4%
Imported confections	57,574	59,559	52,942	57,574	72,795	68,162	66,177	59,559	59,559	59,559	0.4%

(Estimated by Yano Research Institute/Figures for FY2023 are estimates; Figures for FY2024 onward are forecasts)

<Manufacturing-retail segment in the biscuit market>

- In Japan, cookies and biscuits are selected for various uses as gifts, from formal gifts to casual gifts as well as tourist souvenirs. Given that they keep for a long time and their manufacturing method is simple, a characteristic of the biscuit industry is that many manufacturers of Western sweets have added biscuits to their product lineup and there are many participating companies.

- In the manufacturing-retail segment, as a trend in recent years, cookie assortments that come in a tin are a popular item mainly for gift use. Many companies are strengthening their development of products such as this. In 2020, during the global pandemic, demand for small gifts/souvenirs declined. Since then, this demand has gradually recovered and cookies that are packaged in a tin continue to maintain their deep-rooted popularity. However, from 2023, price hikes for tin (cans) (consisting mainly of imports from China) have been pronounced. Coupled with this, the selling price of cookies has also risen. The craze for cookies packaged in a tin is not because of the quality of the cookies themselves but has more to do with competition to development tins that have a better design. During the rising price of tins (cans), biscuits that maintain their intrinsic value, mainly delicious tasting cookies, continue to boast brisk sales. Meanwhile, sales of products that do not maintain their intrinsic value are experiencing weak growth.

- Given the ongoing popularity of cookies packed in a tine, department stores a hosting more events that specialize in cookies. The Hankyu Umeda Main Store (the leading department store in West Japan) held a cookie event, dubbed the "7th Charm of Cookies," named thusly so as it is the seventh consecutive year since 2018 that this event was hosted. The number of attendees to the event is said to be increasing annually. Other department stores are apparently following suit and planning their own cookie events.

- Langue de chat cookies are becoming more diversified as manufacturers come up with new flavored fillings to sandwich between cookies. In light of this, many manufacturers are developing langue de chat cookies that commercialize in the taste of local specialties. These most satisfy the demand of tourists as souvenirs. One typical example that is well known is "*Shiroi-kobito*," from Hokkaido. Other such tourist souvenirs that have been commercialized are the long-lineup of matcha flavored langue de chat cookies from Kyoto, and mango flavored langue de chat cookies that use mango grown in Okinawa. Demand for these types of tourist souvenirs was also hit by the global pandemic but have been making a recovery in and after 2023.

- As a trend in the texture of food, biscuits that are light and crispy, rather than hard and crunchy, are more popular. The popularity of langue de chat cookies reflects this trend.

< Example of sales floors in the manufacturing-retail segment in the biscuit market>

(Source of photos: Website of each company)

Photo (left): YOKUMOKU, a brand specializing in cookies
Photo (right): *Shiroi-kobito*, from ISHIYA Co., Ltd. is a standard souvenir from Hokkaido

<Distribution segment in the biscuit market>

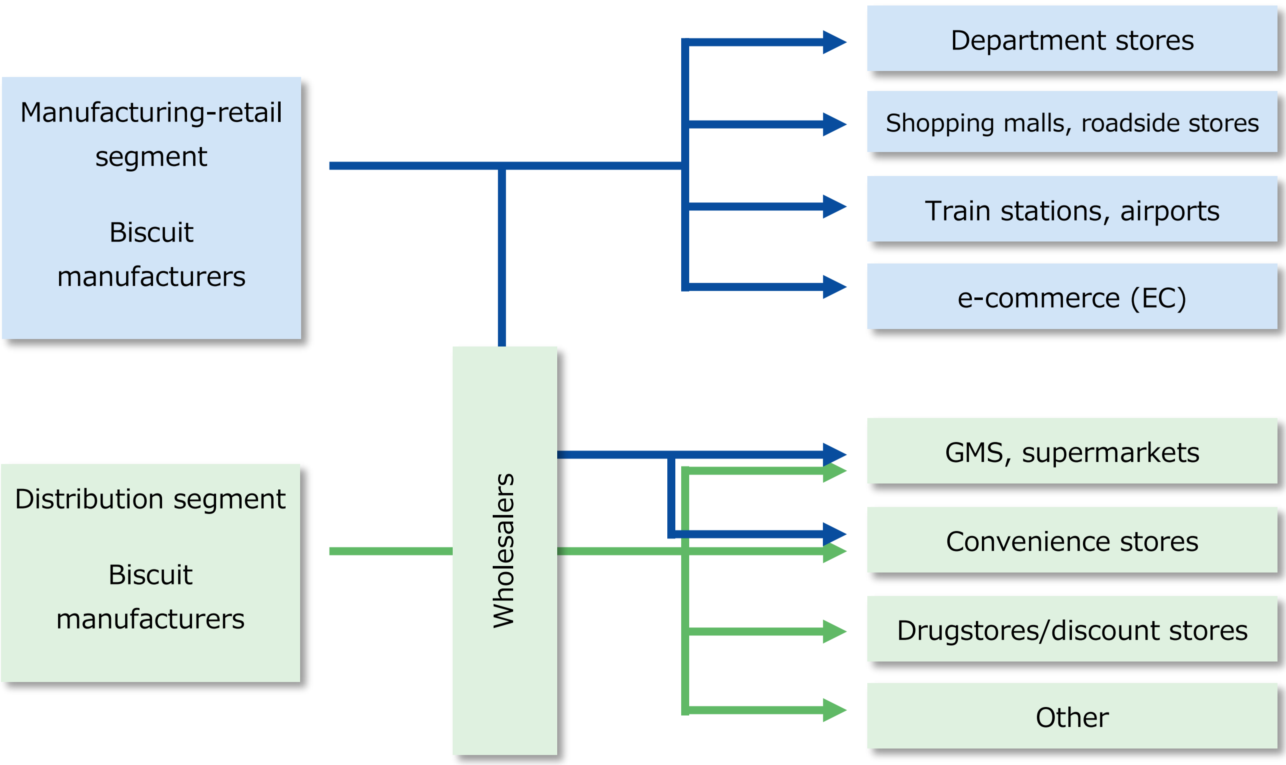
- In the distribution segment in the biscuit market, the majority of this market comprises generally distributed sweets made by Japanese manufacturers. Imported sweets, including "Walkers," are expanding sizably but only account for less than 10% of this market.

- In the market for biscuits made by Japanese manufacturers, one ongoing trend since FY2020 is the briskly trending sales of products that combine biscuits with chocolate, including biscuits coated in chocolate or biscuits where chocolate has been mixed into the dough. This trend grew stronger in FY2023. One factor is that stable and high level of demand among consumers for chocolate. Also, we estimate that consumers who enjoyed the taste of the combination of chocolate and biscuits likely appreciate the high-cost performance of this product, given the growing trend for cutting back or being savings-oriented. Another factor is that given soaring chocolate prices, manufacturers can reduce the amount of chocolate they use by combining it with biscuits. This has become pronounced, in particular, in FY2024.

- One factor behind the lack of substantial growth in imported biscuits in Japan is that biscuit products sold in markets overseas do not meet standards in Japan and the prices appear more expensive than the product is worth. Another factor is that there is no clear-cut differentiation with the products of Japanese manufacturers. The point of not meeting standards in Japan is a frequent factor, especially concerning sweets imported from the United States and countries in Europe. In comparison with people in the United States and

Europe, the Japanese have smaller physiques and there are a fewer number of households in Japan. In light of this, the package content (amount) of products sold in the United States and Europe are too big for the Japanese market. In tandem with this, the selling price feels expensive to the average Japanese consumer. Japanese importers buy (import) product in bulk. By repacking products, i.e. reducing the content of a single package and setting the price range to make it easily accessible, sellers can develop a product that suits the needs of the market in Japan.

DISTRIBUTION, SALES CHANNEL



- The sales channels for biscuits differ between the manufacturing-retail segment and distribution segment. The characteristics of these two segments also differ. The manufacturing-retail segment mainly handles products for gift use. Meanwhile, the distribution segment chiefly handles products for daily consumption. Reflecting this, the sales channels and distribution routes differ.
- The main sales channels for manufacturers in the manufacturing-retail segment are department stores, shopping malls, roadside stores, transportation hub channels including train stations and airports, and EC. Biscuit are used in the various gift-giving scenes throughout the year. Accordingly, there are many participating companies, including privately-owned stores. There are few cases where brands whose main sales channel is department stores purposely wholesale their products to mass retailers, supermarkets or convenience stores.

- The primary sales channels of manufacturers in the distribution segment are GMSs, supermarkets, convenience stores, drugstores, and discount stores. Basically, these manufacturers go through wholesalers. The characteristics of each sales channel are as follows. Given the wide sales floor area at GMSs and supermarkets, these channels carry a wide range of products from bag-type packages that contain many pieces to compact-size packages. Sales floors in convenience stores are narrow, and mostly serve needs for immediate consumption, therefore they mainly carry compact-size products. Drugstores and discount stores implement many markdown sales.
- Imported sweets are mainly sold through the imported sweets corners in supermarkets and imported food specialty stores (KALDI, etc.). Due to their high selling price, they are located separately from the product of Japanese manufacturers.

《Major Biscuit Sales Channels and their Characteristics》

Sales channel	Channel characteristics	Channel growth potential	Sweets sales trends
Department stores	· Sales channel where luxury brands set up stores. Often used when searching for a gift. · In and after 2023, sales have been brisk owing to a recovery in inbound demand. However, as Japanese consumers are shifting to specialty stores, it cannot be denied that this becoming a "sunset industry."		· Boasts the highest status among confection sales channels. Consequently, many brands are available (manufacturing-retail segment gift products). · Department store sales are trending downward overall, with the exception of inbound sales. Among food sales floors, sales of confections are steady as they are differentiated from other channels. ·
Shopping malls	· Consists of large-scale tenants, including specialty stores, supermarkets and other shops. There are many customers during the weekend, whereas the are few shoppers on weekdays.		· Tenants including specialty stores, including GODIVA and Lindt. The format is more casual than that of department stores, therefore the number of brands setting up shop in shopping malls is limited.
Train stations, airports (Transportation hubs)	· Wide range of sales, including daily-use items and gifts, bought by users of train stations and airports who are commuting or traveling. On advantage of "EKINAKA," a sales floor located inside a train station once you pass through the ticket gate, offers more convenient access than department stores.		· In Japan, EKINAKA is becoming popular. It is become a permanent channel for purchasing a small gift or present when going out. This channel is becoming a competing channel against department stores.
GMSs, supermarkets	· GMSs, which offer everything from apparel to daily goods, are shrinking (shifting to becoming		· The area of sales floors is wide allowing them to handle a relatively broad range of

Sales channel	Channel characteristics	Channel growth potential	Sweets sales trends
	a specialty store for apparel and daily items). ・ Sales at supermarkets, which chiefly offer food items, are not expected to sizably expand but are trending steadily. ・ Many customers are women in their 40s to 70s.		products, from standard products to new products. ・ There are also markdown sales but in comparison with drugstores and discount stores, prices are closer to list/retail prices.
Convenience stores	・ The core products handled by convenience stores are food items and beverages. Convenience stores are small-scale retail stores that operate around the clock. ・ This channel conducts few markdown sales and comparatively sells products at list price. ・ Customers consist mostly of men in their 20s to 40s.	⇨	・ Given that its main demand is for immediate consumption, there many compact-size products. The sales floor is narrow therefore there is a trend to focus on best-sellers. ・ There are many products that target young consumers.
Drugstores	・ Drugstores sell a diverse range of products from OTC drugs to cosmetics, daily goods and food items. ・ Customers are drawn in with low-priced food sales with the aim of this leading to the sale of high-margin OTC drugs. Owing to this strategy, in the food industry, this channel is recognized as a bargain sales channel. ・ In recent years, mainly major business operators that manage drugstores are aggressively opening new stores to increase store numbers.	⬀	・ This channel is on a growth trajectory owing to an increase in the number of stores. ・ However, given ongoing price hikes, markdown sales are reaching a limit. Going forward, there is a possibility drugstores will increase their appeal of product value, including health benefits.
Discount stores	・ Discount stores, such as Don Quijote, are growing thanks to tailwinds from an increase in inbound demand.	⬀	・ This channel is similar to drugstores as they handle markdown sales. ・ Shelf displays with a large volume of products that target inbound customers (particularly gummy candy and KitKats).

POSITIONING OF DOMESTIC PRODUCTS AND IMPORTED PRODUCTS

《Top 10 biscuit companies by sales and share in the distribution segment》 (Rows highlighted in light blue are oversea companies/brands)

Sales Trends (Unit: 1,000 USD)

FY2023		Fiscal year						CAGR
Ranking	Company name	2018	2019	2020	2021	2022	2023	2018-2023
1	Bourbon	415,724	423,202	427,503	427,503	426,841	430,812	0.7%
2	Fujiya	170,604	171,597	168,751	148,236	178,678	178,678	0.9%
3	Morinaga Seika	129,045	134,207	146,251	138,972	144,133	157,104	4.0%
4	Lotte	164,781	156,839	180,001	146,648	138,972	152,207	-1.6%
5	Ezaki Glico	162,642	171,745	158,798	122,580	129,118	134,200	-3.8%
6	Ginbis	48,971	55,589	59,559	72,795	107,207	120,442	19.7%
7	Mondelēz International	92,648	93,971	95,957	95,957	95,295	99,927	1.5%
8	YAMAZAKI-BISCUITS	91,324	82,721	86,917	71,471	68,149	73,589	-4.2%
9	Ito Biscuits	37,456	39,706	46,986	46,986	53,603	59,559	9.7%
10	Tohato	57,442	53,736	54,265	56,250	48,309	49,633	-2.9%
	Other	1,258,575	1,324,649	1,308,120	1,165,489	1,124,419	1,134,677	-2.1%
	Market total	2,629,211	2,707,961	2,733,108	2,492,886	2,514,724	2,590,828	-0.3%

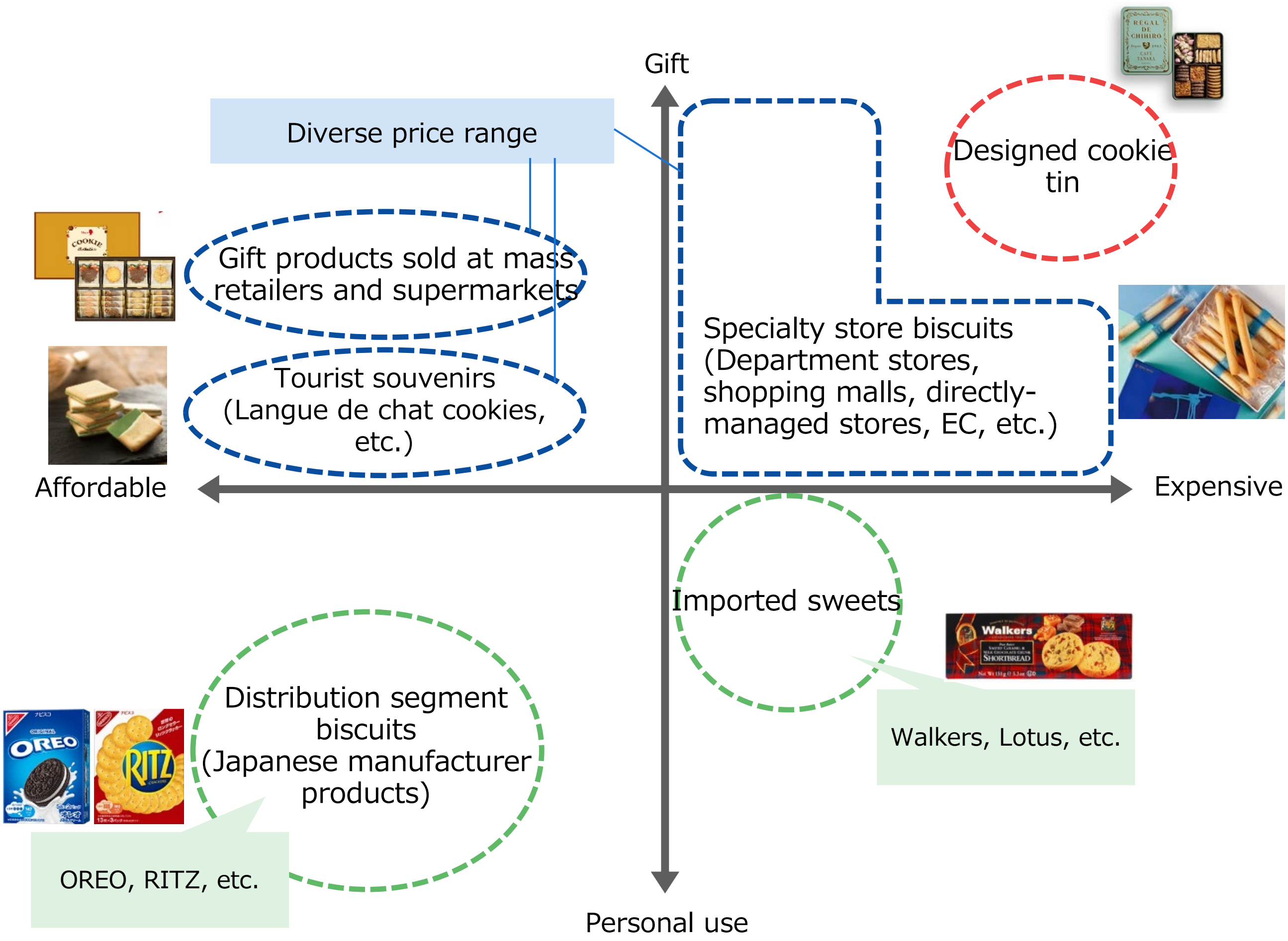
Market Share Transition (Unit: %; percentage points for increase/decrease)

FY2023		Fiscal year						Market share Incr/Decr*
Ranking	Company name	2018	2019	2020	2021	2022	2023	2018-2023
1	Bourbon	15.8	15.6	15.6	17.1	17.0	16.6	0.8
2	Fujiya	6.5	6.3	6.2	5.9	7.1	6.9	0.4
3	Morinaga Seika	4.9	5.0	5.4	5.6	5.7	6.1	1.2
4	Lotte	6.3	5.8	6.6	5.9	5.5	5.9	-0.4
5	Ezaki Glico	6.2	6.3	5.8	4.9	5.1	5.2	-1.0
6	Ginbis	1.9	2.1	2.2	2.9	4.3	4.6	2.8
7	Mondelēz International	3.5	3.5	3.5	3.8	3.8	3.9	0.3
8	YAMAZAKI-BISCUITS	3.5	3.1	3.2	2.9	2.7	2.8	-0.6
9	Ito Biscuits	1.4	1.5	1.7	1.9	2.1	2.3	0.9
10	Tohato	2.2	2.0	2.0	2.3	1.9	1.9	-0.3
	Other	47.9	48.9	47.9	46.8	44.7	43.8	-4.1

(Includes estimates by Yano Research Institute)

- Manufacturer shares of the distribution segment in the biscuit market are shown above. Japanese manufacturers account for most of the top 10 leading companies. There are many products with low selling prices. There is only one foreign company, Mondelēz International, Inc. (Brand names include OREO, RITZ, and PREMIUM). Note that, in accordance with a licensing agreement with Mondelēz, OREO, RITZ, and PREMIUM was previously manufactured and sold by YAMAZAKI-NABISCO Co., Ltd. (currently known as YAMAZAKI-BISCUITS Co., Ltd.). This contract came to a close in August 2016, upon which time Mondelēz International switched its format to the import and sales of these products, as opposed to manufacturing them at overseas factories of Mondelēz. Reflecting this, these products are not sold in imported sweets corners or imported food stores, but in the general sweets section. That being said, YAMAZAKI-BISCUITS, along with the completion of the deployment of "OREO" and "RITZ" products, is currently selling "Noir," "Levain Prime," and "Levain Classical" and is at present in a competitive relationship with Mondelēz International.

《Positioning map for biscuits》



*Photos: Taken from the websites of each company

(Prepared by Yano Research Institute)

- There is a wide range of uses for biscuit products. The price range, therefore, is diverse, extending from expensive to low-priced items. They have high value as a gift and high-end cookies packaged in a tin boast brand rarity as they are handmade and cannot be mass products. However, there are also various other types of biscuits.
- In biscuits sold to supermarkets and convenience stores in the distribution segment, there is a steep price gap between sweets made by Japanese manufacturers and imported sweets. The selling price on imported biscuits is higher than for biscuit made by Japanese manufacturers. They are not often used for gift purposes. They are primarily consumed by the individual that purchased them. In light of this, the price range is high and securing demand is difficult.

CHARACTERISTICS OF MAJOR PRODUCTS & TOP-SELLING PRODUCTS

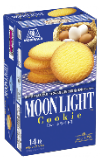
Atelier UKAI		Four sec (Small) 148g $19.7 USD (tax included)	Directly-managed stores, EC, department stores, some train stations, etc.
CAFÉ TANAKA		REGAL DE CHIHIRO 55 pieces $34.5 USD (tax included)	Directly-managed stores, EC, department stores, etc.
YOKUMOKU		Shigar 14 pieces $8.0 USD (tax included)	Directly-managed stores, EC, department stores, some train stations, etc.
Mary's		Cookie Collection 12 pieces $7.1 USD (tax included)	GMSs, supermarket gift corner
ISHIYA		Shiroi Koibito langue de chat cookies 12 pieces $6.9 USD (tax included)	Directly-managed stores in Hokkaido, department stores, train stations, airports, EC, etc.
BOURBON		CHOCOCHIPS COOKIES 9 pieces $1.4 USD (tax included)	Mass retailers, convenience stores, drugstores, discount stores, etc.
Fujiya		COUNTRY MA'AM 18 pieces $2.7 USD (tax included)	Mass retailers, convenience stores, drugstores, discount stores, etc.
Morinaga MOONLIGHT		MOONLIGHT 14 pieces $1.6 USD (tax included)	Mass retailers, convenience stores, drugstores, discount stores, etc.
Walkers		Salted Caramel & Milk Chocolate Shortbread 150g $5.4 USD (tax included)	Import food specialty stores, imported sweets corner at supermarkets
Lotus		Original Caramel Biscuit 156g $2.4 USD (tax included)	Import food specialty stores, imported sweets corner at supermarkets

*Photo: Taken from websites of each company

MAJOR IMPORTERS

■Mitsubishi Shokuhin Co., Ltd. (https://www.mitsubishi-shokuhin.com/en/)

Mitsubishi Shokuhin Co., Ltd., a wholly-owned subsidiary of Mitsubishi Corporation, is a major general food wholesaler. The company purchases merchandise from food manufacturers in Japan and sells them wholesale to GMSs, supermarkets, convenience stores, drugstores, and discount stores. In addition to this, the company is also deploying the wholesale of imported confections purchased from overseas manufacturers (imported confections business). The main brand of biscuits it imports and sells is Walkers. Aside from biscuits, the company also imports and sells brands such as Lindt, HARIBO, and Ricola.

■Kitano Shoji Co., Ltd. (https://www.kitano-kk.co.jp/)

This trading firm which deals in the import of food was founded in 1948. Including boasting brands that have the No. 1 share in their respective category in their home countries, Kitano Shoji, which has been traversing the world for more than 70 years, imports and sells sweets and food products in Japan, extending from wafers to curry powder from around the world. The key brands it handled include Loacker as well as a rich lineup of biscuit brands, such as Bahlsen, Hellema, Taste Delight, Biscottificio Belli, Préférés d'Amandine, Pierre BISCUITERIE, Biscuiterie de Abbaye, and MILLER'S. The company deals in many brands from Europe but also imports products from Thailand, India and other countries in Asia.

■NIS Foods Service Corporation (https://www.nis.co.jp/)

NIS Foods is a member of the ITOCHU Group. As a subsidiary of Nippon Access, Inc. (comprehensive food wholesaler), NIS Foods engages in the import and sales of confections and food products. The company imports Lotus Biscoff, a biscuit product. Aside from biscuits, it deals in the import and sales of brands such as FERRERO ROCHER, Cadbury, Toblerone, COTE DOR (non-chocolate products), Nutella, SKIPPYR, and Melissa.

■EIM CO.,LTD. (https://www.eim.co.jp/)

The pillar of the wholesale business is the import of sweets from the United States and countries in Europe and wholesale to distributors in Japan. In addition, the company not only imports and sells final products, but also tackles activities that involve the repackaging of products imported in bulk, and commercializes them using original package designs. DAELMANS is an imported biscuit brand being deployed. Aside from biscuits, the company also imports and sells HAMLET, Walker's Nonsuch, LACASA, VILLARS, and VANINI, THE LORENZ BAHLSEN, GOULIBEUR, Yupi, and Fini.

■MONTOILE Co., Ltd. (https://montoile.co.jp/)

A comprehensive sweets wholesaler and subsidiary of YAMABOSHIYA Co., Ltd., the company deals in the product planning, development and importation of sweets. Imported sweets include Bazooka Candy Brands、bon o bon (non-chocolate products), and McVitie's (biscuits).

■CREET., LTD. (**https://www.confex.co.jp/about/group/cleat/**)

The comprehensive sweets wholesaler of the Confex Group. The company engages in product planning, development and import and sales of sweets. CREET's strength is in imported sweets for low-end business formats, including DAISO, a 100-yen shop, and Don Quijote. It also imports and sells the Turkish brand Elvan, as well as the biscuit brand ORE LIETE.

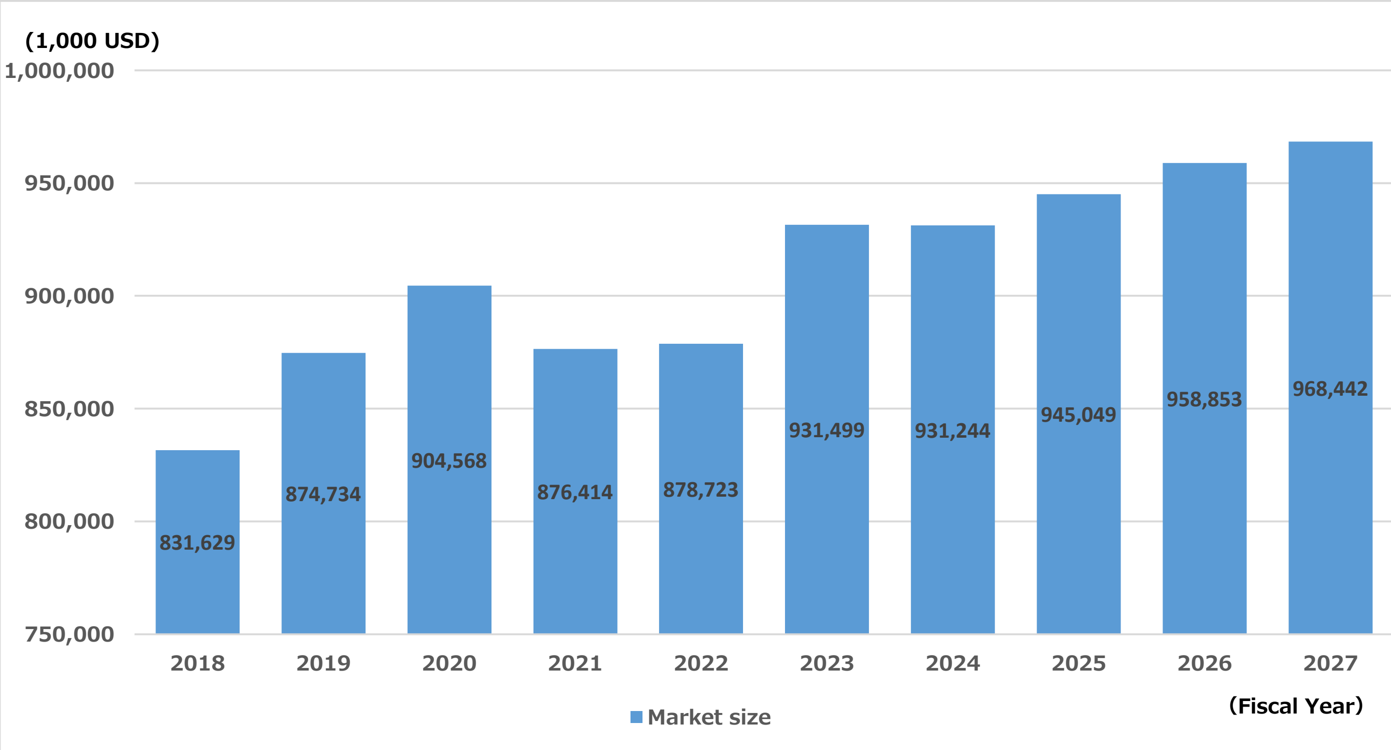
4. Pasta

Key points of the market trend and characteristics

- **In the medium-term perspective, the market is on the rise as unit prices are rising.**
- **At households in Japan, there is a growing demand for products that can reduce the time and effort required for cooking, leading to an increase in corresponding products. For example, the variety of quick-cooking pasta, which shortens boiling time, and frozen pasta that can be cooked in the microwave has also been expanding. Easier to stock is also the key, and those products divided per meal or those with a fastened package to store the remaining are increasing. Dried pasta and retort pasta sauces are popular in terms also of emergency meals to stockpile, because of their long shelf life and ability to be stored at room temperature.**
- **Food service businesses face the issue to reduce cooking time due to manpower shortage. Business-use frozen pasta that can be prepared by using microwave sells well as a solution.**
- **Pasta is sold mainly at supermarkets and imported food stores and is often displayed side by side with pasta sauces.**
- **Imported pasta is distributed largely in two forms in Japan: Import through authorized distributers or by parallel importing.**
- **Both the import value and volume have been on an uptrend in recent years. The increase in import value is particularly outstanding, because of rising unit prices. The price rise is seen not only among overseas brands but also among domestic ones.**
- **Italy is the largest importer of pasta for Japan. Ever since Japan-EU EPA has been enforced in February 2019, the duty on pasta products from EU has been reduced in stages and eventually to none by 2028. This is likely to make Italian pasta to be further familiar for Japanese households. Home-use Turkish pasta is considered to have 2% of market share.**

Market Size

MARKET SIZE TRANSITION AND FORECAST (BY VALUE, FY2018 TO FY2027)



	Fiscal year										CAGR
	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2018-2027
Market size (1,000 USD)	831,629	874,734	904,568	876,414	878,723	931,499	931,244	945,049	958,853	968,442	1.7%
Year-on-Year	99.3	105.2	103.4	96.9	100.3	106.0	100.0	101.5	101.5	101.0	

*Figure for FY2023 is the projection, and for FY2024 is the forecast.
(Estimated by Yano Research Institute)

- The market is on an uptrend in the medium-term perspective due to increasing unit prices. The market size for FY2023 is projected to reach $931,499 thousand USD (up 6.0% on YoY). CAGR from FY2018 to FY2027 expects 1.7%, with the market size for FY2027 forecasted at $968,442 thousand USD.
- While demand for pasta surged in FY2020 as a popular item to be consumed at home amid the COVID-19 crisis, the pasta market downturned during FY2021 and FY2022 from the surge, and then returned to an expansion for FY2023.
- In Japan, the country prone to disasters including earthquakes, pasta is a popular pantry item to stockpile for emergency due to long shelf life and ability to be stored at room temperature.
- Demand for pasta available to cook by microwave or to be cooked/boiled faster is increasing. This trend is likely to continue.

TOTAL IMPORT SIZE BY COUNTRY (HS CODE-BASED, FY2018 TO FY2023, VALUE & VOLUME)

《Import value transition》

FY2023	(1,000 USD)	Fiscal year						CAGR
Ranking	Country name	2018	2019	2020	2021	2022	2023	2018-2023
1	Italy	58,042	63,555	74,826	71,292	86,931	101,196	11.8%
2	South Korea	32,254	40,023	59,866	75,361	86,704	86,476	21.8%
3	China	48,926	46,074	49,863	50,839	65,101	70,772	7.7%
4	Türkiye	29,816	30,065	34,477	31,026	57,809	63,723	16.4%
5	Thailand	20,144	20,452	19,482	23,762	28,859	31,608	9.4%
6	Vietnam	14,930	15,947	20,152	18,326	26,914	26,970	12.6%
7	United States	20,814	20,173	21,788	20,602	31,911	26,357	4.8%
8	Belgium	1,953	2,389	2,537	2,381	3,716	3,304	11.1%
9	Greece	1,554	1,568	1,951	1,884	4,096	2,952	13.7%
10	France	306	556	1,112	480	1,002	2,782	55.5%
11	Taiwan	1,725	1,606	1,775	1,980	2,596	2,655	9.0%
12	Indonesia	402	568	863	819	1,090	1,650	32.6%
13	Myanmar	229	540	853	674	1,156	1,118	37.3%
14	Nepal	83	190	264	260	597	1,117	68.4%
15	Australia	778	651	854	1,035	729	926	3.5%
16	Malaysia	133	132	122	141	323	827	44.2%
17	UAE	672	469	714	582	685	522	-4.9%
18	Egypt	55	126	545	287	196	374	46.7%
19	Spain	183	238	306	707	1,016	344	13.5%
20	Singapore	220	232	277	342	367	278	4.9%
	Other	1,061	1,282	1,974	1,609	1,161	1,253	3.4%
	Total	234,279	246,836	294,601	304,389	402,958	427,206	12.8%
	YoY (%)	100.2%	105.4%	119.4%	103.3%	132.4%	106.0%	

*Cumulative total, from April to March
*Share of top 10 countries: 97.4% (2023)
*Actual import from Türkiye: 63,723 thousand USD, share 14.9%, ranks 4th (2023)

- Import value has increased in recent years, with CAGR from FY2018 to FY2023 reaching 12.8%

《Import volume transition》

FY2023 Ranking	Unit:(ton) Country name	2018	2019	2020	2021	2022	2023	CAGR 2018-2023
		Fiscal year						
1	Italy	65,784	78,722	87,570	74,009	65,198	67,934	0.6%
2	Türkiye	50,314	48,843	60,184	47,263	60,925	61,693	4.2%
3	South Korea	12,599	15,976	24,517	29,442	31,642	29,839	18.8%
4	China	22,866	21,908	23,765	22,739	23,577	24,517	1.4%
5	United States	19,553	20,367	23,189	18,405	18,078	14,092	-6.3%
6	Thailand	8,142	8,317	8,232	9,202	9,705	9,628	3.4%
7	Vietnam	5,374	5,948	8,068	7,273	8,511	8,112	8.6%
8	Greece	2,571	2,877	3,454	2,847	4,475	2,881	2.3%
9	Belgium	1,418	1,649	1,826	1,525	1,827	1,432	0.2%
10	Taiwan	765	742	831	777	852	791	0.7%
11	Indonesia	233	324	489	406	444	638	22.3%
12	France	104	165	344	150	293	590	41.5%
13	UAE	1,284	756	1,206	851	705	527	-16.3%
14	Egypt	124	280	1,208	494	245	491	31.6%
15	Nepal	43	107	152	144	249	455	60.0%
16	Malaysia	82	79	110	124	169	353	33.8%
17	Australia	245	223	281	305	182	207	-3.3%
18	Myanmar	47	119	201	148	211	194	32.7%
19	Philippines	87	70	75	150	107	119	6.4%
20	Latvia	520	707	2,159	758	97	115	-26.1%
	Other	831	984	742	791	745	524	-8.8%
	Total	192,987	209,164	248,603	217,803	228,239	225,132	3.1%
	YoY (%)	99.1%	108.4%	118.9%	87.6%	104.8%	98.6%	

*Cumulative total, from April to March
*Share of top 10 countries: 98.1% (2023)
*Actual import from Türkiye: 61,693t, share 27.4%, ranks 2nd (2023)

《Unit price transition》

	2018	2019	2020	2021	2022	2023	CAGR 2018-2023
	Fiscal year						
Unit price (US$/kg)	1.21	1.18	1.19	1.40	1.77	1.90	9.3%
Year-on-Year (%)	101.1	97.2	100.4	117.9	126.3	107.5	

- While the import value is larger in the order of Italy, South Korea, China, and Türkiye, the import volume from Türkiye is the second largest following Italy.
- CAGR (FY2018-2023) for the import value is strong at 12.8%, while that for import volume remains at 3.1%. As the CAGR for the unit price is positive at 9.3%, the rise in value can be said to be because of the increase in unit prices.

- Prices of pasta both by domestic and imported brands are on the rise, because of soaring costs for general materials, logistics, and packaging, in addition to price rise of durum wheat, the main ingredient for pasta.

Key Information for Exporting to Japan

TARIFFS (HS CODE-BASED)

*General or Temporary rate shall be applied unless a specific tariff rate is shown in the tables below.

Statistical code		Description	Tariff rate						
H.S. code			Türkiye	General	Temporary	ASEAN	CPTPP	EU	US
19.02		Pasta, whether or not cooked or stuffed (with meat or other substances) or otherwise prepared, such as spaghetti, macaroni, noodles, lasagne, gnocchi, ravioli, cannelloni; couscous, whether or not prepared							
		Uncooked pasta, not stuffed or otherwise prepared :							
1902.11	000	Containing eggs	30 yen/kg	40 yen/kg			6.67 yen/kg	6.67 yen/kg	6.67 yen/kg
1902.19		Other							
	010	1 Biefun	27.20 yen/kg	32 yen/kg			9.89 yen/kg	18.55 yen/kg	
		2 Other		40 yen/kg					
		- Macaroni and spaghetti							
	093	-- Spaghetti	30 yen/kg				16 yen/kg	10.91 yen/kg	16 yen/kg
	094	-- Macaroni	30 yen/kg				16 yen/kg	10.91 yen/kg	16 yen/kg
		- Other							
	092	-- Udon, somen and soba	34 yen/kg				For the Pooled Quota Free Other than for the Pooled Quota 34 yen/kg	For the Pooled Quota Free	
	099	-- Other	34 yen/kg				19.46 yen/kg	12.36 yen/kg	19.46 yen/kg
1902.20		Stuffed pasta, whether or not cooked or otherwise prepared							
		1 Containing added sugar							

Statistical code		Description	Tariff rate						
H.S. code			Türkiye	General	Temporary	ASEAN	CPTPP	EU	US
	110	(1) Containing more than 20% by weight of sausage, meat, meat offal, blood, insects, fish or crustaceans, molluscs or other aquatic invertebrates, or any combination thereof, and also containing ebi predominating by weight over each of such other products	5.1%	6%			1.8%	1.9%	
	190	(2) Other	23.8%	28%			8.6%	8.7%	
		2 Other							
	210	(1) Containing more than 20% by weight of sausage, meat, meat offal, blood, insects, fish or crustaceans, molluscs or other aquatic invertebrates, or any combination thereof, and also containing ebi predominating by weight over each of such other products	5.1%	6%			1.8%	1.9%	
	220	(2) Other	21.3%	25%		Not containing meat and meat offal of bovine animals, and containing less than 30% of natural milk constituents by weight, calculated on the dry matter 21.3%	7.7%	7.7%	7.7%
1902.30		Other pasta							
	100	1 Containing added sugar	23.8%	28%		Containing less than 30% of natural milk constituents by weight, calculated on the dry matter 23.8%	8.6%	8.7%	8.6%

Statistical code		Description	Tariff rate						
H.S. code			Türkiye	General	Temporary	ASEAN	CPTPP	EU	US
		2 Other		25%					
	210	- Instant Ramen and other instant noodles	21.3%			21.3%	7.7%	7.7%	7.7%
	290	- Other	21.3%			21.3%	7.7%	7.7%	7.7%
1902.40	000	Couscous	12 yen/kg	40 yen/kg		12 yen/kg	8.73 yen/kg	8.73 yen/kg	8.73 yen/kg

RELATED LEGAL SYSTEMS, REGULATIONS

Food Sanitation Act (https://www.mhlw.go.jp/stf/seisakunitsuite/bunya/0000144562.html)

Main items	Competent authorities	Regulations when importing
Food (confectionery, beverages, etc.) water, food additives, supplements, etc.	Ministry of Health, Labour and Welfare (MHLW)	Notification must be made to MHLW

《Outline》

- **The Food Sanitation Act aims to prevent sanitation hazards resulting from eating and drinking and to ensure food safety thereby protecting citizens' health. The Act also applies to imported foods.**
- **A person who intends to import food, etc. for the purpose of sale or to use in business is obliged to make an import notification from this perspective to ensure food safety, based on Article 27 of the Food Sanitation Act.**
- **Notifications are accepted at the quarantine station, where a food sanitation inspector examines the foods and products to confirm their compliance with the criteria and standards of the Food Sanitation Act, and the necessity of an inspection. (A consultation service is available.)**

《Notification procedures》

(1) Preparing for documents needed for the notification:
- ◆ Notification Form for Importation of Foods, etc.
- ◆ Other documents
  - · Description of raw materials and manufacturing processes (processed foods, etc., as required)
  - · Health (sanitary) certificate (as required)
  - · Test results (as required)

(2) Submit the completed Notification Form and other documentation to the quarantine station responsible for the port of import.

(3) The notification form and other documentation submitted are examined by a food sanitation inspector based on legislation to determine the necessity of inspections. When the document examination and cargo inspection have found that the cargo conforms to the act (the cargo

"passed" the inspection), a "Certificate of Notification" will be returned to the importer from the MHLW quarantine station where the notification was first submitted.

《Recent amendments to Food Sanitation Act》

- To secure food safety against changes in environment surrounding food and food internationalization, the Food Sanitation Act has been amended in 2019 as follows:

(1) Reinforcement of wide-area food poisoning incident response

(2) Institutionalization of sanitation control in compliance with HACCP

(3) Obligation to notify health damage incident caused by intake of their food products containing the designated ingredients or components

(4) Introducing a positive list system for food containers and packaging
Reference of lists:
https://www.mhlw.go.jp/content/11130500/000638983.xlsm
https://www.mhlw.go.jp/content/11130500/000635356.xlsx

(5) Revision of licensing system and establishment of notification system for food business

(6) Obligation to notify food recall information to the government

(7) Further enhancement of import and export food safety certification:
For the purpose to confirm that the inspections and control have properly been conducted in the exporting countries for insurance of safety of imported foods, sanitation control based on HACCP and attachment of sanitation certificates of dairy products or aquatic food are required as a requisite of import.

《Other key points to notify》

Food additives and pesticide residues are also regulated by the Food Sanitation Act. Since there are often publicized cases of violations of food additives and pesticide residues in imported foods, a positive list is provided here.

<u>Food additives</u>

- Food additives such as preservatives, sweeteners, colorants, and flavoring agents used in the process of food production or for the purpose of food processing and preservation are also regulated under the Food Sanitation Act. MHLW allows the use of food additives only when they have been judged by the Food Safety Commission as not inflicting any risks on human health, and only after specifying standards for ingredients and criteria for their use. MHLW also strives to ensure the safety of food additives that have been approved for use by, for example, surveying the per capita intake of food additives. See below for the positive list of food additives.

Excel https://www.mhlw.go.jp/content/001031538.xlsx

Pesticide residue

- To ensure that pesticide remained in food not to inflict on human health, MHLW sets the residue standards for all agricultural chemicals, feed additives, and animal drugs. The residue standards are set by the Food Safety Commission for each food within the range of amount not harmful to intake. Any foods with agricultural chemicals, etc. remained at the level surpassing the standard are banned for sale or import by the Food Sanitation Act.
- To ensure that pesticide residues do not exceed standards, the Ministry of Agriculture, Forestry and Fisheries (MAFF) sets the usage standard based on the Agricultural Chemicals Regulation Act. When foods are being imported, they are inspected for pesticide residues at the quarantine station.

For the search on pesticide residue standard values: https://db.ffcr.or.jp/front/

Food Labeling Act（https://www.caa.go.jp/en/policy/food_labeling/）

Main items	Regulatory authority	Measures to take
All food items sold for consumers, etc.	Consumer Affairs Agency	Labeling on container packages in Japanese language

《Labeling details》

- Following nine items are needed to be labeled for foods sold to consumers:

Items to label	Descriptions
1. General name	Indicate common name that expresses the process food contents.
2. Storage condition	Storage condition of the product before opening the package should be indicated in accordance with the characteristics of the food, such as "Store at room temperature out of direct sunlight", "Store at 10°C or below", etc.
3. Use by date or Best before date	Label "use by date" for foods that are quick to deteriorate in quality, while label "best before date" for all other foods.
4. Ingredients used	· Indicate the most common name of raw materials used, in descending order of percentage by weight. · For composite materials that comprise two or more of raw materials, list all materials in descending order of percentage by weight within the parentheses after the composite material name.
5. Additives	Indicate the name of substance for additives, in descending order of percentage by weight, except for those used for nutritious enhancement, processing aids, or those that can be applied to the "carry-over" principle.
6. Content or solid volume and total content	Indicate content weight, content volume, or content quantity. Content weight should be labeled in grams or kilograms, content volume in milliliters or liters, and content quantity in units such as number of pieces.
7. Amount and calorific value of nutrients	For consumer processed foods, calories, amount of protein, fat, carbohydrate, and sodium should be indicated.
8. Name and address of food business operator	Of food business operators, indicate the name and address of the person who is responsible for food labeling descriptions.

9. Location of manufacturing or processing plant and name of manufacturer or processor, etc.	Indicate the location of manufacturing or processing plant and the name of manufacturer or processer. For imported products, indicate the location of the importer's office and the name of the importer.

- In addition to the above, some items need to be indicated if certain requirements are met. The following two items need particular notice.

Items to indicate	Descriptions
Allergen	· Allergen labeling is mandatory for processed foods made from specified raw materials and foods containing additives derived from specified raw materials. · Allergen labeling is recommended for processed foods made from ingredients equivalent to specified raw materials. **Mandatory to label - Specific 8 ingredients:** Shrimp, crab, walnut, wheat, soba (buckwheat), eggs, milk, peanut **Recommended to label – 20 ingredients equivalent to specified raw materials:** Almond, abalone, squid, salmon roe, orange, cashew nut, kiwi fruit, beef, sesame, salmon, mackerel, soybean, chicken, banana, pork, macadamia nut, peach, yam, apples, gelatin
Country of origin	For imported products, name of the country of origin should be indicated.

(Source: "An Introduction of Rule in Japan "Food Labeling Guide" - Aiming for Food Safety and Reliability" by Food Labeling Certification Association, Consumer Affairs Agency)

Market Information

MARKET TRENDS IN RECENT YEARS

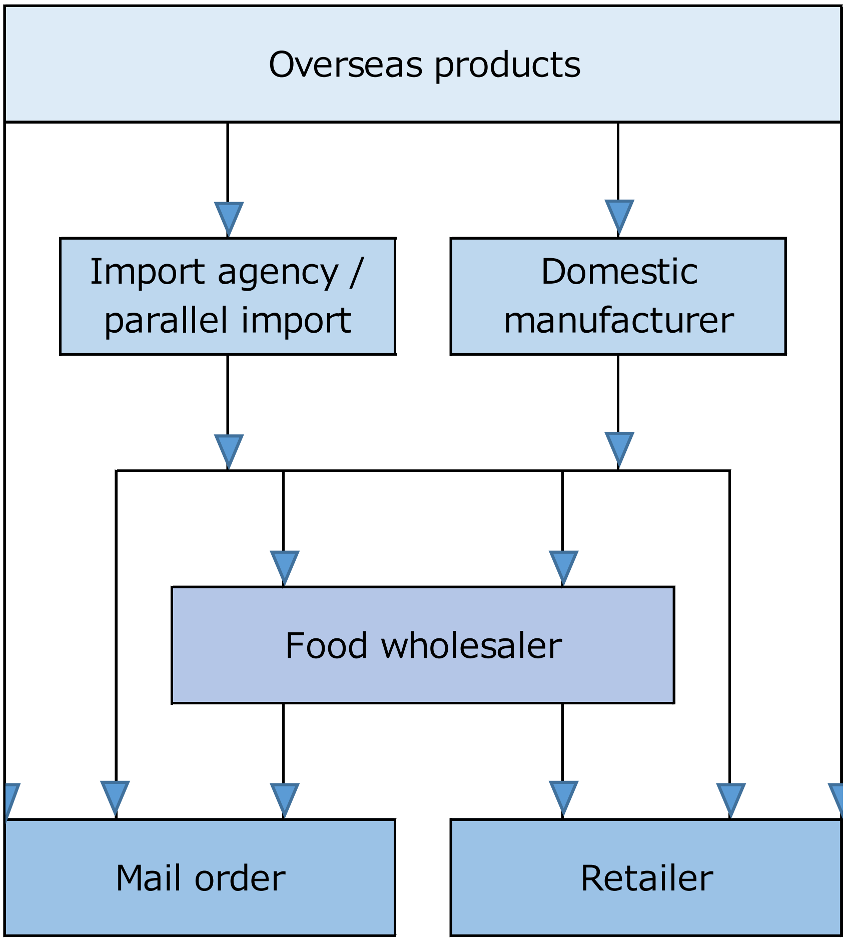
- **After a downturn from surged demand amid the COVID-19 crisis, the market of long pasta suffered from sluggish sales during FY2021 and FY2022 but has recovered due to efforts by each manufacturer to develop and launch those products that can cook quickly or that can prepare by microwave. An increasing number of households stockpile dried pasta and retort pasta sauces as an emergency food to prepare for disasters because of their long shelf life and their availability of room temperature storage.**

- **Short pastas like macaroni and penne are convenient to use in various dishes including salads, soups, sides, etc. They, of course, can be a variety of tasty pasta dishes depending on sauces, so that each manufacturer strives to stimulate demand for short pasta sauces. As time saving and simplification are prioritized in cooking lately, cooking using only a frying pan has become popular. Pasta available for such a cooking method or that saves time and simplifies cooking processes by being cooked in microwave have widened the user base. Despite frequent price revisions that have caused consumers to avoid buying some products, which reduced the sales by volume, the sales of pasta by value for FY2023 seem to have exceeded that of the previous fiscal year, thanks to price revisions.**

- **In the food service business, so-called "family restaurants" i.e., diners, have many opportunities to serve pasta dishes. The whole sales of food business during FY2020 and FY2022 dropped due to the pandemic, but seemingly recovered in FY2023.**
- **The largest pasta importer for Japan is Italy. Ever since Japan-EU EPA has been enforced in February 2019, the tariff on pasta products from EU has been reduced in stages and eventually to none by 2028, the eleventh year (*) since enforcement, which is likely for Japanese households to have easier access to Italian pasta. (*April 2019 is considered as the second year since enforcement.)**

DISTRIBUTION, SALES CHANNEL

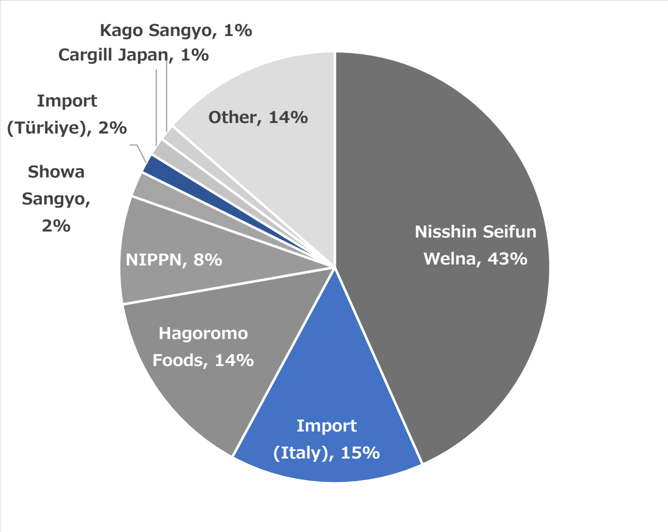
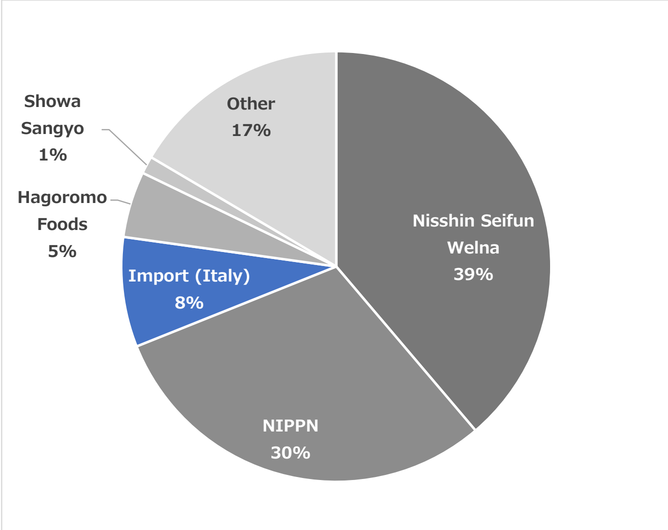
《Distribution of pasta》



- Imported pasta in Japan is largely divided into those that are sold through a distributor who has entered into an agency agreement with a Japanese business, or through parallel importing.
- Pasta is sold mainly at supermarkets and imported food stores and is often sold side by side with pasta sauces.

POSITIONING OF DOMESTIC PRODUCTS AND IMPORTED PRODUCTS

《Market share by major manufacturer in Japan》

Pasta	Macaroni
	

(Calculated based on POS data)

- In Japan, the company that has the largest market share for pasta is Nisshin Seifun Welna Inc. The company is the manufacturer of "Ma-ma" pasta brand, while it imports and sells "De Cecco" brand pasta.
- Other Japanese pasta manufacturers with large market shares are Nippn Corporation that develops "Oh My" pasta series, and Hagoromo Foods Corporation that has "Popolo Spa" and "Carboff" brands.
- Imported Italian pasta products have a certain market share. The market share of imported pasta from Türkiye is around 2%.
- Major imported products are as follows:

《Top share overseas brands in Japan》

Brand name of imported products	De Cecco	Divella	Prossimo	Pezzullo	Guzel
Logo					
Country of origin	Italy	Italy	Türkiye	Italy	Türkiye
Major importer	Nisshin Seifun Welna Inc./ FUJI TRADING CO., LTD.	Memo's	Kato Sangyo	Kato Sangyo	-
Brand name of imported products	**Chiara**	**Garofalo**	**Agnesi**	**Solleone**	**Mennucci**
Logo					
Country of origin	Türkiye	Italy	Italy	Italy	Italy
Major importer	-	Meidi-ya	PIETRO	Japan Europe Trading	Japan Europe Trading
Brand name of imported products	**La Molisana**	**Di Martino**	**Mancini**	**Alce Nero**	**-**
Logo					-
Country of origin	Italy	Italy	Italy	Italy	-
Major importer	Monte Bussan	Monte Bussan	Monte Bussan	Nichifutsu Boueki	-

CHARACTERISTICS OF MAJOR PRODUCTS & TOP-SELLING PRODUCTS

- For home-use products, because of growing demand for reducing the labor and shortening the hours for cooking, products that meet such demand are increasing. For instance, increased varieties are observed in frozen pasta that can be cooked by microwave, or those products that require only two to four minutes of boiling thanks to the novel techniques in dried noodles. In addition, storage convenience is also required, so that those pasta bundled together by a meal (i.e. 100 gram each) or those with a zip-sealed package are widely accepted.

- For products used in food service business, too, business-use frozen pasta that can microwave sell well, because of increasing demand for products that save time due to personnel shortage.
- Good-textured pasta including fresh pasta is also popular, increasing the products for household use. In addition, pasta with 50% of carbohydrate reduced has been released, backed by higher health consciousness.

《Product examples》

Manufacturer	Product name	Standard	Price (with tax) *
Nisshin Seifun Welna Inc.	"Ma-ma" spaghetti 1.6mm, bound together per meal, package with a fastener	100g×6 bundles	$3.1 USD
Characteristics	As spaghetti is bundled together by 100g, no measuring is needed. Because the package has a fastener, convenient to store.		
Product image (Source: Company website)			

* Retail price on ecommerce site (www.yodobashi.com, as of September 11, 2024)

Manufacturer	Product name
Nisshin Seifun Welna Inc.	"Ma-ma" THE PRO PASTA STELLA Series (Business use)
Characteristics	A business-use product that supplements manpower shortage. As can be cooked in a microwave, it is designed to contribute to onsite work efficiency. It can be served as a dish with or without some arrangements. There are both products with springy texture using dried pasta and products with chewy texture using fresh pasta.
Product image (Source: Company website)	 

MAJOR IMPORTERS

- Imported pasta in Japan is largely divided into those that are sold through an authorized distributor or through parallel importing.
- Nisshin Seifun Welna Inc. is both the manufacturer of its original "Ma-ma" pasta brand and the authorized distributor of "De Cecco" brand pasta.

Company name	Address	Company description in brief	URL
Memo's Co., Ltd.	Sanki Osaka Honsha Bldg 5F, 3-2 Kawaramachi 3-chome, Chuo-ku, Osaka-shi, Osaka	Wholesaler of imported foods, liquor, and apparel products	https://memos.co.jp/
Kato Sangyo Co., Ltd.	9-20 Matsubara-cho, Nishinomiya, Hyogo	General food wholesaler; seller of Kanpy products	https://www.katosangyo.co.jp/
Fuji Trading Co., Ltd.	3-9-3, Shinyamashita, Naka-ku, Yokohama, Kanagawa	Importer/exporter business, including import of ingredients	https://www.fujitrading.co.jp/
Meidi-Ya Co., Ltd.	2-2-8 Kyobashi, Chuo-ku, Tokyo	Manufacturer, retailer, importer/exporter of foods and liquors; ship chandler; importer and seller of machinery; real estate business	https://www.meidi-ya.co.jp/index.html
PIETRO Co., Ltd.	3-4-5 Tenjin, Chuo-ku, Fukuoka-City Fukuoka	Manufacturer and seller of dressing and sauce; management of restaurants featuring pasta dishes; direct sales ("PIETRO A DAY")	https://www.pietro.co.jp/
Japan Europe Trading Co., Ltd.	Icon Place Shibakoen 4F, 2-18 Shiba 3-chome, Minato-ku, Tokyo	Importer and seller of liquors and foods	https://www.jetlc.co.jp/
Monte Bussan Corporation	Aoyama Oval Bldg 6F, 52-2 Jingumae 5-chome, Sibuya-ku, Tokyo	Importer and seller of liquors and foods	https://www.montebussan.co.jp/
Nichifutsu Boueki K.K.	Kasumigaseki Place, 3-6-7 Chiyoda-ku, Tokyo	Importer and seller of foods, food ingredients, and beverages	https://nbkk.co.jp/
Nisshin Seifun Welna Inc.	25, Kanda-Nishiki-cho 1-chome, Chiyoda-ku, Tokyo	Manufacturer and seller of pasta, pasta sauce, prepared mix, home-use flour, cooked foods, dried noodles, and processed foods including frozen foods	https://www.nisshin-seifun-welna.com/index/

5. Sauces and Mustards

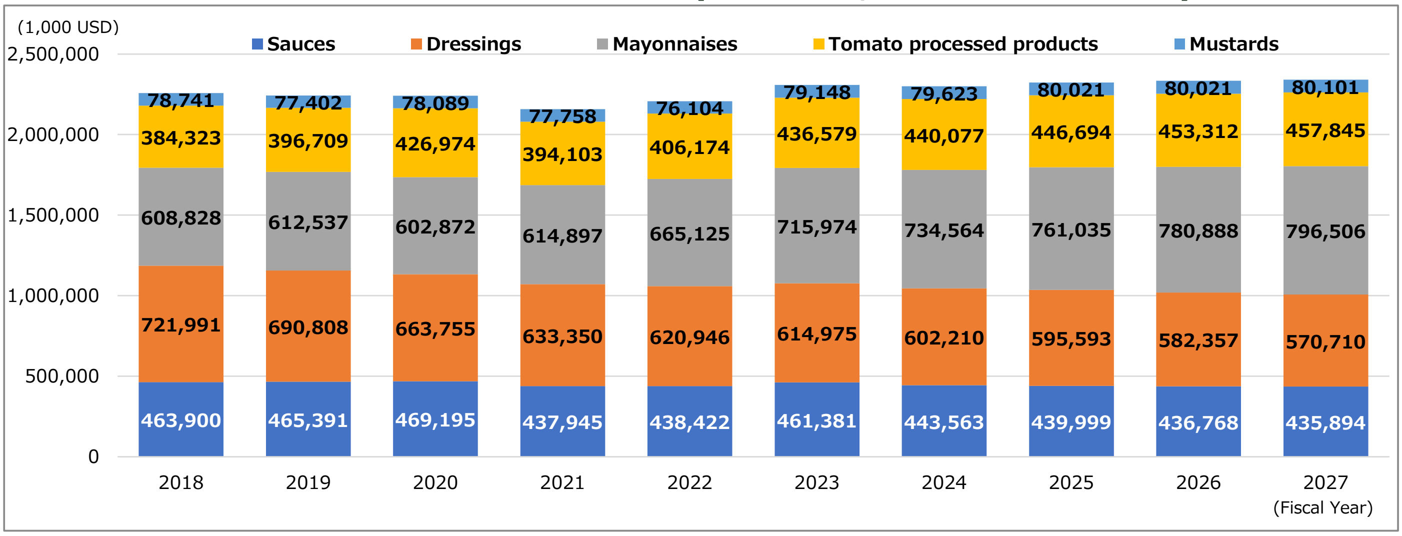
This chapter describes the market for sauces and mustards, including sauces, dressings, mayonnaise, tomato processed products, and mustards.

Key points of the market trend and characteristics

- **The sales of sauces and mustards in Japan are growing steadily.**
- **As a recent trend, products that respond to health consciousness are on the rise. There are many products developed and launched to provide a wide variety of flavors.**
- **In addition to the contents, there are some innovations in capacity and containers. Containers that promote quality retention and easier use, as well as products sold in multiple capacities to accommodate various household compositions are observed.**
- **As daily used sauces and dressings are mostly those by domestic manufacturers, imported items are used less frequently. They are used only for cooking specific cuisines of foreign countries. For example, ethnic cuisines, Chinese and Korean foods are very popular.**
- **Though available at major supermarkets, not many in variety. Often, they are parallel import items sold at imported food stores.**

Market Size

MARKET SIZE TRANSITION AND FORECAST (BY VALUE, FY2018 TO FY2027)



(1,000 USD)		Fiscal year 2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	CAGR 2018-2027
Total of sauces and condiments		2,257,783	2,242,848	2,240,884	2,158,053	2,206,771	2,308,057	2,300,037	2,323,342	2,333,346	2,341,056	0.4%
	YoY	101.1	99.3	99.9	96.3	102.3	104.6	99.7	101.0	100.4	100.3	
Sauces		463,900	465,391	469,195	437,945	438,422	461,381	443,563	439,999	436,768	435,894	-0.7%
	YoY	99.2	100.3	100.8	93.3	100.1	105.2	96.1	99.2	99.3	99.8	
Dressings		721,991	690,808	663,755	633,350	620,946	614,975	602,210	595,593	582,357	570,710	-2.6%
	YoY	96.6	95.7	96.1	95.4	98.0	99.0	97.9	98.9	97.8	98.0	
Mayonnaises		608,828	612,537	602,872	614,897	665,125	715,974	734,564	761,035	780,888	796,506	3.0%
	YoY	101.0	100.6	98.4	102.0	108.2	107.6	102.6	103.6	102.6	102.0	
Tomato processed products		384,323	396,709	426,974	394,103	406,174	436,579	440,077	446,694	453,312	457,845	2.0%
	YoY	113.9	103.2	107.6	92.3	103.1	107.5	100.8	101.5	101.5	101.0	
Mustards		78,741	77,402	78,089	77,758	76,104	79,148	79,623	80,021	80,021	80,101	0.2%
	YoY	101.0	98.3	100.9	99.6	97.9	104.0	100.6	100.5	100.0	100.1	

*Figure for FY2023 is the projection, and for FY2024 is the forecast.
(Estimated by Yano Research Institute)

- The market of sauces and mustards in Japan have been on a steady growth, at $2,308,057 thousand USD for FY2023 (up 4.6% on YoY). With CAGR from FY2018 to FY2027 expected to be 0.4%, the market size is projected to reach $2,341,056 thousand USD by FY2027.
- While domestic major manufacturers receive support from many consumers for their regular products, their product development to provide a wide variety of products has invigorated the market. This tendency is prominent in dressings, with a wide selection of flavors.
- As a recent trend, products that meet both taste and health-consciousness, such as no additives, reduced salts, non-oil, and low calories, are in demand. As households with only elderly composition or small numbers of household members are increasing, containers that are small portioned or individually packed are requested, which have led to invigorated container development, generating well-thought-out containers, such as those easy to open, resealable, airtight to preserve freshness, easy to pour, easy to hold, etc.
- Tomato processed products have diversified into various genres, from cooking sauces, products for simplified cooking, and hot pot soup preparations, because of improved value of tomatoes and increased tomato consumption in the country. Among various tomato products, tomato ketchup, one of well-selling products, has also increased the variety especially of

health-conscious products, such as those using only domestically produced tomatoes, half the calories of conventional products, or high formation of lycopene.

- In a long-term view, the market of sauces and mustard market is likely to decline gradually, after repetitive level-offs and decreases, due to waning Japanese population.

TOTAL IMPORT SIZE BY COUNTRY (HS CODE-BASED, FY2018 TO FY2023, VALUE & VOLUME)

《Import value transition》

FY2023 Ranking	(1,000 USD) Country name	Fiscal year 2018	2019	2020	2021	2022	2023	CAGR 2018-2023
1	Thailand	50,617	54,931	59,848	60,258	69,485	69,933	6.7%
2	China	28,804	30,818	37,767	44,212	51,047	55,297	13.9%
3	United States	32,353	34,971	30,640	38,663	47,547	44,381	6.5%
4	Vietnam	18,718	20,049	22,455	23,624	28,633	30,043	9.9%
5	South Korea	12,996	12,859	18,326	26,391	30,324	27,915	16.5%
6	Australia	16,283	16,555	13,148	14,397	23,657	27,747	11.2%
7	New Zealand	18,123	19,493	18,070	17,250	20,085	19,176	1.1%
8	Hong Kong	13,760	12,478	12,154	15,228	15,314	16,096	3.2%
9	Italy	5,264	5,580	7,241	7,969	10,616	10,966	15.8%
10	France	5,895	6,171	5,669	5,578	7,488	8,176	6.8%
11	Canada	2,769	3,683	3,484	5,026	5,847	6,941	20.2%
12	Netherlands	2,109	2,303	2,790	2,957	3,857	3,631	11.5%
13	Indonesia	789	885	2,048	2,225	2,948	3,316	33.3%
14	Mexico	355	301	1,494	1,945	2,529	1,573	34.7%
15	Taiwan	1,086	1,151	1,221	1,212	1,378	1,525	7.0%
16	Belize	1,020	950	1,079	1,205	1,179	1,511	8.2%
17	Philippines	865	987	1,403	1,531	1,743	1,468	11.2%
18	Spain	173	396	924	1,235	895	1,295	49.5%
19	Belgium	661	844	836	1,168	1,384	1,195	12.6%
20	United Kingdom	693	685	656	885	1,103	919	5.8%
40	Türkiye	16.1	33.7	20.6	56.4	24.8	32.5	15.1%
	Other	6,286	5,679	5,543	5,247	5,084	4,752	-5.4%
	Total	219,636	231,806	246,817	278,263	332,167	337,888	9.0%
	YoY (%)	102.3	105.5	106.5	112.7	119.4	101.7	

*Cumulative total, from April to March
*Share of top 10 countries: 91.7% (2023)
*Actual import from Türkiye: 32.5 thousand USD, share 0.01%, ranks 40th (2023)

- The largest importer by value for Japan is Thailand. It is because of the popularity of ethnic cuisines, increasing the import of related sauces and condiments. Thai curry is not only a popular dish at restaurants with many varieties, but also has home-use Thai curry pastes and preparations.
- The second largest importer for Japan is China, which is reflected from many Chinese condiments imported, as Chinese meals are well established in Japan.

《Import volume transition》

FY2023 Ranking	Unit:(ton) Country name	Fiscal year 2018	2019	2020	2021	2022	2023	CAGR 2018-2023
1	Thailand	24,699	25,268	28,089	26,834	26,407	23,804	-0.7%
2	China	15,261	16,571	19,277	19,673	19,243	20,029	5.6%
3	Vietnam	14,128	14,950	16,567	15,653	14,941	15,271	1.6%
4	South Korea	7,169	6,791	9,363	12,459	11,889	10,397	7.7%
5	United States	14,475	15,356	12,431	12,983	13,115	10,273	-6.6%
6	New Zealand	12,047	13,342	11,196	9,843	10,311	9,425	-4.8%
7	Australia	6,246	6,794	4,399	4,666	6,089	6,509	0.8%
8	Hong Kong	4,625	4,360	4,096	4,888	4,090	3,914	-3.3%
9	Netherlands	2,119	2,565	3,071	2,907	3,476	2,621	4.3%
10	Italy	1,569	1,738	2,627	2,442	2,662	2,258	7.6%
11	Canada	1,380	1,809	1,729	2,202	1,747	1,716	4.5%
12	France	1,622	1,615	1,374	1,394	1,616	1,473	-1.9%
13	Mexico	162	137	1,622	1,828	1,886	1,016	44.3%
14	Indonesia	307	354	597	569	525	821	21.8%
15	Philippines	509	564	705	790	687	604	3.5%
16	Spain	77	165	329	575	355	386	38.0%
17	Taiwan	437	383	487	330	282	309	-6.7%
18	Belgium	143	160	176	248	275	210	8.1%
19	Poland	11	20	11	25	220	190	77.0%
20	Belize	168	162	164	157	132	158	-1.3%
38	Türkiye	3	46	11	42	3	6	20.4%
	Other	1,529	1,610	1,551	1,547	1,351	1,100	-6.4%
	Total	108,686	114,760	119,871	122,054	121,300	112,491	0.7%
	YoY (%)	102.7	105.6	104.5	101.8	99.4	92.7	

*Cumulative total, from April to March

*Share of top 10 countries: 92.9% (2023)

*Actual import from Türkiye: 6.328 tons, share 0.006%, ranks at 38th (2023)

《Unit price transition》

	Fiscal year 2018	2019	2020	2021	2022	2023	CAGR 2018-2023
Unit price (US$/kg)	2.02	2.02	2.06	2.28	2.74	3.00	8.2%
Year-on-Year (%)	99.7	100.0	101.9	110.7	120.1	109.7	

- CAGR (FY2018-2023) for the import value is strong at 9.0%, while that for import volume remains at 0.7%. CAGR for the unit price is positive at 8.2%. The price of sauces and mustards is rising, due to soaring costs for raw materials, production, and logistics.

Key Information for Exporting to Japan

TARIFFS (HS CODE-BASED)

*General or Temporary rate shall be applied unless a specific tariff rate is shown in the tables below.

Statistical code		Description	Tariff rate						
H.S. code			Türkiye	General	Temporary	ASEAN	CPTPP	EU	US
21.03		Sauces and preparations therefor; mixed condiments and mixed seasonings; mustard flour and meal and prepared mustard							
2103.10	000	Soya sauce	6%	9.6%		Free	Free	Free	Free
2103.20		Tomato ketchup and other tomato sauces							
	010	1 Tomato ketchup	21.3%	25%		21.3%	7.7%	7.7%	
	090	2 Other tomato sauces	17%	20%		17%	6.1%	6.2%	
2103.30		Mustard flour and meal and prepared mustard							
	100	1 Put up in containers for retail sale	9%	12.2%		Free	Free	Free	
	200	2 Other	7.5%	10.3%		Free	Free	Free	
2103.90		Other							
		1 Sauces							
	110	(1) Mayonnaise	12.8%	12.8%		12.8%	Free	Free	
	120	(2) French dressings and salad dressings	10.5%	12%		10.5%	Free	Free	
	130	(3) Other	6%	9.6%		Free	Free	Free	Free
		2 Other							
	210	(1) Instant curry and other curry preparations	3.6%	9.6%		Free	Free	Free	
		(2) Other							
	221	A Consisting chiefly of sodiumglutamate	4.8%	16%		Free	Free	Free	
	229	B Other	10.5%	14%		Free	Free	Free	

RELATED LEGAL SYSTEMS, REGULATIONS

Food Sanitation Act (https://www.mhlw.go.jp/stf/seisakunitsuite/bunya/0000144562.html)

Main items	Regulatory authority	Regulations when importing
Food (confectionery, beverages, etc.) water, food additives, supplements, etc.	Ministry of Health, Labour and Welfare (MHLW)	Notification must be made to MHLW

《**Outline**》

- **The Food Sanitation Act aims to prevent sanitation hazards resulting from eating and drinking and to ensure food safety thereby protecting citizens' health. The Act also applies to imported foods.**
- **A person who intends to import food, etc. for the purpose of sale or to use in business is obliged to make an import notification from this perspective to ensure food safety, based on Article 27 of the Food Sanitation Act.**
- **Notifications are accepted at the quarantine station, where a food sanitation inspector examines the foods and products to confirm their compliance with the criteria and standards of the Food Sanitation Act, and the necessity of an inspection. (A consultation service is available.)**

《**Notification procedures**》

(1) Preparing for documents needed for the notification:
- ◆ Notification Form for Importation of Foods, etc.
- ◆ Other documents
  - · Description of raw materials and manufacturing processes (processed foods, etc., as required)
  - · Health (sanitary) certificate (as required)
  - · Test results (as required)

(2) Submit the completed Notification Form and other documentation to the quarantine station responsible for the port of import.

(3) The notification form and other documentation submitted are examined by a food sanitation inspector based on legislation to determine the necessity of inspections.

(4) When the document examination and cargo inspection have found that the cargo conforms to the act (the cargo "passed" the inspection), a "Certificate of Notification" will be returned to the importer from the MHLW quarantine station where the notification was first submitted.

《**Recent amendments to Food Sanitation Act**》

· To secure food safety against changes in environment surrounding food and food internationalization, the Food Sanitation Act has been amended in 2019 as follows:

(1) Reinforcement of wide-area food poisoning incident response

(2) Institutionalization of sanitation control in compliance with HACCP

(3) Obligation to notify health damage incident caused by intake of their food products containing the designated ingredients or components

(4) Introducing a positive list system for food containers and packaging
Reference of lists:
https://www.mhlw.go.jp/content/11130500/000638983.xlsm
https://www.mhlw.go.jp/content/11130500/000635356.xlsx

(5) Revision of licensing system and establishment of notification system for food business

(6) Obligation to notify food recall information to the government

(7) Further enhancement of import and export food safety certification:
For the purpose to confirm that the inspections and control have properly been conducted in the exporting countries for insurance of safety of imported foods, sanitation control based on HACCP and attachment of sanitation certificates of dairy products or aquatic food are required as a requisite of import.

《Other key points to notify》

Food additives and pesticide residues are also regulated by the Food Sanitation Act. Since there are often publicized cases of violations of food additives and pesticide residues in imported foods, a positive list is provided here.

<u>Food additives</u>

- Food additives such as preservatives, sweeteners, colorants, and flavoring agents used in the process of food production or for the purpose of food processing and preservation are also regulated under the Food Sanitation Act. MHLW allows the use of food additives only when they have been judged by the Food Safety Commission as not inflicting any risks on human health, and only after specifying standards for ingredients and criteria for their use. MHLW also strives to ensure the safety of food additives that have been approved for use by, for example, surveying the per capita intake of food additives. See below for the positive list of food additives.

Excel https://www.mhlw.go.jp/content/001031538.xlsx

<u>Pesticide residue</u>

- To ensure that pesticide remained in food not to inflict on human health, MHLW sets the residue standards for all agricultural chemicals, feed additives, and animal drugs. The residue standards are set by the Food Safety Commission for each food within the range of amount not harmful to intake. Any foods with agricultural chemicals, etc. remained at the level surpassing the standard are banned for sale or import by the Food Sanitation Act.
- To ensure that pesticide residues do not exceed standards, the Ministry of Agriculture, Forestry and Fisheries (MAFF) sets the usage standard based on the Agricultural Chemicals Regulation Act. When foods are being imported, they are inspected for pesticide residues at the quarantine station.

For the search on pesticide residue standard values: https://db.ffcr.or.jp/front/

Food Labeling Act（https://www.caa.go.jp/en/policy/food_labeling/）

Main items	Regulatory authority	Measures to take
All food items sold for consumers, etc.	Consumer Affairs Agency	Labeling on container packages in Japanese language

《Labeling details》

・ Following nine items are needed to be labeled for foods sold to consumers:

Items to label	Descriptions
1. General name	Indicate common name that expresses the process food contents. Some names such as "mayonnaise" "ketchup" need to meet certain requirements.
2. Storage condition	Storage condition of the product before opening the package should be indicated in accordance with the characteristics of the food, such as "Store at room temperature out of direct sunlight", "Store at 10°C or below", etc.
3. Use by date or Best before date	Label "use by date" for foods that are quick to deteriorate in quality, while label "best before date" for all other foods.
4. Ingredients used	・ Indicate the most common name of raw materials used, in descending order of percentage by weight. ・ For composite materials that comprise two or more of raw materials, list all materials in descending order of percentage by weight within the parentheses after the composite material name.
5. Additives	Indicate the name of substance for additives, in descending order of percentage by weight, except for those used for nutritious enhancement, processing aids, or those that can be applied to the "carry-over" principle.
6. Content or solid volume and total content	Indicate content weight, content volume, or content quantity. Content weight should be labeled in grams or kilograms, content volume in milliliters or liters, and content quantity in units such as number of pieces.
7. Amount and calorific value of nutrients	For consumer processed foods, calories, amount of protein, fat, carbohydrate, and sodium should be indicated.
8. Name and address of food business operator	Of food business operators, indicate the name and address of the person who is responsible for food labeling descriptions.
9. Location of manufacturing or processing plant and name of manufacturer or processor, etc.	Indicate the location of manufacturing or processing plant and the name of manufacturer or processer. For imported products, indicate the location of the importer's office and the name of the importer.

・ In addition to the above, some items need to be indicated if certain requirements are met. The following two items need particular notice.

Items to indicate	Descriptions
Allergen	・Allergen labeling is mandatory for processed foods made from specified raw materials and foods containing additives derived from specified raw materials. ・Allergen labeling is recommended for processed foods made from ingredients equivalent to specified raw materials. **Mandatory to label - Specific 8 ingredients:** Shrimp, crab, walnut, wheat, soba (buckwheat), eggs, milk, peanut **Recommended to label – 20 ingredients equivalent to specified raw materials:** Almond, abalone, squid, salmon roe, orange, cashew nut, kiwi fruit, beef, sesame, salmon, mackerel, soybean, chicken, banana, pork, macadamia nut, peach, yam, apples, gelatin
Country of origin	For imported products, name of the country of origin should be indicated.

(Source: "An Introduction of Rule in Japan "Food Labeling Guide" - Aiming for Food Safety and Reliability" by Food Labeling Certification Association, Consumer Affairs Agency)

Market Information

MARKET TRENDS IN RECENT YEARS

	Fiscal year										CAGR
(1,000 USD)	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2018-2027
Total of sauces and condiments	2,257,783	2,242,848	2,240,884	2,158,053	2,206,771	2,308,057	2,300,037	2,323,342	2,333,346	2,341,056	0.4%
YoY	101.1	99.3	99.9	96.3	102.3	104.6	99.7	101.0	100.4	100.3	
Sauces	463,900	465,391	469,195	437,945	438,422	461,381	443,563	439,999	436,768	435,894	-0.7%
YoY	99.2	100.3	100.8	93.3	100.1	105.2	96.1	99.2	99.3	99.8	
Dressings	721,991	690,808	663,755	633,350	620,946	614,975	602,210	595,593	582,357	570,710	-2.6%
YoY	96.6	95.7	96.1	95.4	98.0	99.0	97.9	98.9	97.8	98.0	
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Mustards	78,741	77,402	78,089	77,758	76,104	79,148	79,623	80,021	80,021	80,101	0.2%
YoY	101.0	98.3	100.9	99.6	97.9	104.0	100.6	100.5	100.0	100.1	

*Figure for FY2023 is the projection, and for FY2024 is the forecast.
(Estimated by Yano Research Institute)

- By keeping steady growth, the sauces and mustard market in Japan for FY2023 reached $2,308,057 thousand USD. The market size for FY2027 is projected to reach $2,341,056 thousand USD, with estimated CAGR from FY2018 to FY2027 to be 0.4%.

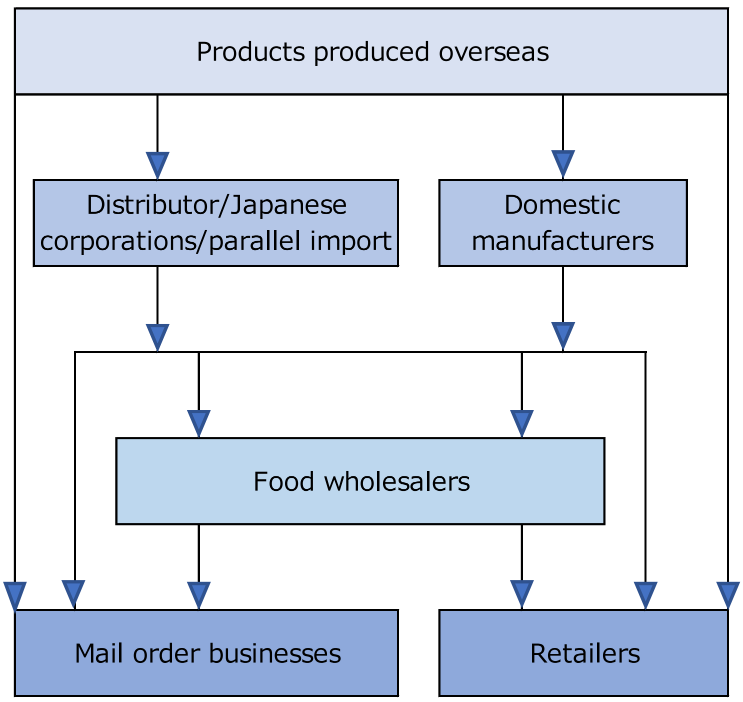
- As Worcestershire sauces are frequently used in Japan as cooking sauce or hidden taste to bring about subtle difference, sources are generally in stable demand. On the other hand, sauces are facing severe competition due to diversification of each of various sauces and to increased suggestions for use. Consequently, the sauce market is leveling off or on a slight decline.

- The dressing market is in a shrinking trend. This indicates that both optimization of prices and market size expansion are needed. Product lines have expanded, as more health-conscious products developed, such as non-oil dressings, in addition to increased flavor variations.

- For Mayonnaise, health-conscious products such as those with reduced salts or no eggs used, those that are FOSHU or foods with functional claims are available at stores. Meanwhile, mayonnaise has recently been known for its usefulness in cooking, such as it works as the oil for frying, or as the agent to bring ingredients tenderer or softer. This has led some consumers to go back to using regular ones from healthy types.
- Tomato processed products have expanded the varieties to various cooking sauces, hot pot soup preparations, etc., due to improved healthy value of tomatoes and increased domestic tomato consumption. Tomato ketchup, the major product among various tomato processed products, shows robust demand, due to product development from extensive perspectives, such as domestic tomatoes used, half the calories, more lycopene contained, etc.
- Some resource circulation efforts are made for containers of dressings and mayonnaise that contain oil. As a part of it, demonstrations for collecting used bottles are to take place.

DISTRIBUTION, SALES CHANNEL

《Distribution of sauces and mustards》



- Not many imported products are observed at major supermarkets. Many imported sauces and mustards are sold as parallel imported products at imported food stores.

POSITIONING OF DOMESTIC PRODUCTS AND IMPORTED PRODUCTS

《Comparison between FY2023 market size and import value》

Items	Domestic market size (1,000 USD)	Import value (1,000 USD)	Trade statistics (HS Code-based)
Sauces	461,381	192,357	2103.90-130
Dressings	614,975	132	2103.90-120
Mayonnaises	715,974	1,604	2103.90-110
Tomato processed products	436,579	9,179	2103.20-010/090
Mustards	79,148	19,334	2103.30-100/200

- As an overall trend, condiments are supplied by domestic manufacturers as they develop products optimal for Japanese preference. Therefore, imported sauces and mustards are not used that often. Most frequently used situation for imported products is when cooking foreign dishes.

- Sauces have a certain demand, as there are various sauces according to the dishes such as ethnic, Chinese, South Korean cuisines, respectively. Meanwhile, daily used Worcestershire sauces are mostly those produced by Japanese manufacturers.
- For mustard, there are Japanese and Western mustards that are differently perceived and used. Japanese mustard, which is called "Karashi" or "Wagarashi", is used for adding an accent in Japanese dishes including natto and is manufactured by Japanese manufacturers. Mustard, on the other hand, is used to append to sausages and pot-au-feu. Both the products by domestic manufacturers and those imported are in circulation.
- Tomato processed foods, too, are mostly occupied by domestic products. Among imported products, the "Heinz" brand is relatively well known.
- Mayonnaise and dressings are overwhelmingly occupied by those of domestic manufacturers. Use of imported products is not often.

CHARACTERISTICS OF MAJOR PRODUCTS & TOP-SELLING PRODUCTS

- Many consumers are long-time users of regular items, though the market has some trends.
- As bottles tend to be heavy and somewhat troublesome to discard (allowed to discard on certain days of week and washing needed), plastic containers are used for many products.
- Because of an increase in households with single or a few members, products sold in multiple capacities to accommodate various household compositions are observed.
- Major domestic products are as follows.

《Product examples》

[Sauces]

Manufacturer	Product name	Standard	Price (with tax) *
Otafuku Sauce Co., Ltd.	Okonomi Sauce	500g	$3.1 USD
Ingredients	Vegetables, fruits (tomatoes imported, dates, onions, etc.,) saccharides (high-fructose corn syrup, sugar), brewed vinegar, hydrolyzed vegetable protein, salt, soy sauce, spices, oyster extract, sugar processed product (sugar, brewed vinegar), beef extract, yeast extract, konbu seaweed, hydrolyzed protein, shiitake mushroom/thickener (processed starch, polysaccharide thickener), flavor enhancer (amino acid, etc.,) (in part wheat, soybean, chicken, pork, peach, apple are included.)		
Characteristics	Tomatoes, dates, onions and other vegetables and fruits added with 20 spices are blended in. The sweetness of dates gives profoundness in taste.		
Product image (Source: Company website)			

* The price in the company website (as of 17 Sep. 2024)

- Many consumers use regular products. Not only used just before eating, but also as cooking sauce or as a secret ingredient during cooking processes.

[Dressings]

Manufacturer	Product name	Standard	Price (with tax) *
Kewpie Corporation	Kewpie Dressing series	180ml	$1.3～1.9 USD
Characteristics	Products developed in a wide variety of series. Different dressings can be used according to dishes and user mood.		
Product image (Source: Company website)	  		

* The price shown in the company website (as of 17 Sep. 2024)

- A wide variety of products with many variations in taste are available at retailers
- In addition to regular products, season-limited products and health-conscious products such as half-calories or non-oil are available.

[Mayonnaise]

Manufacturer	Product name	Standard	Price (with tax) *
Kewpie Corporation	KEWPIE Mayonnaise	450g	$3.4 USD
Ingredients	Edible vegetable fats (manufactured in Japan), egg yolk, brewed vinegar, salt, spices/ flavor enhancer (amino acid, etc.,) spice extracts, (in part egg, soybean, apple are included.)		
Characteristics	The richness in flavor from egg yolk is enhanced by special vinegar for flavor. Enhances the natural taste of dishes.		
Product image (Source: Company website)			

*Reference retail price shown in the company website (as of 17 Sep 2024)

- In addition to regular products, healthy products such as products with reduced calories are available. As the result of each company having developed various health-conscious products, the taste has improved to no different from regular ones, unlike in the past. Healthy products have a strong appeal as products with added values. Nevertheless, some consumers that once used healthy products have returned to regular ones.

[Tomato processed products]

Manufacturer	Product name	Standard	Price (with tax) *
KAGOME CO., LTD.	Kagome Tomato Ketchup	500ml	$2.3 USD
Ingredients	Tomatoes (imported or produced in Japan (less than 5%)), saccharides (sugar/high-fructose corn syrup, glucose), brewed vinegar, salt, onion, spices		
Characteristics	Using ketchup-specific tomatoes, the product is made by the long-inherited method since foundation of the company.		
Product image (Source: Company website)			

*Retail price at ecommerce site (www.yodobashi.com) as of 17 Sep. 2024

- Products have been developed from extensive perspectives, such as domestic tomatoes used, half the calories, more lycopene contained, etc.
- Because the products are used for diverse cuisines, large capacity products are available.

[Mustards]

Manufacturer	Product name	Standard	Price (with tax) *
S&B FOODS INC.	Premium Honnama Honkarashi	43g	$1.6 USD
Ingredients	Mustard (Canada), salt, dextrin, starch, corn oil/sorbit, acidulant, flavoring agent, thickener (xanthan), antioxidant (vitamin C)		
Characteristics	Rich aroma and a little bitterness are brought out from original blended mustard. Users can enjoy smooth texture as well as the color from natural mustard material.		
Product image (Source: Company website)	 		

*The price shown in the company website (https://www.sbotodoke.com/shop/default.aspx) as of Sep.2024

- For Japanese mustard, paste type products in a tube container have widespread. Often, the product is displayed side by side with other pasted products of "wasabi" "ginger" "garlic", etc.
- Western mustard is usually displayed apart from Japanese mustard products. Many are bottled.

MAJOR IMPORTERS

- As mentioned in the previously mentioned "Positioning of domestic products and imported products", circulation of overseas brands is few. Heinz Japan Ltd., Japanese subsidiary of Kraft Heinz Foods Company from the United States, is often seen, but no other brands are found.
- Many seem to be distributed through trading firms.

Company name	Location	Description	URL
Mitsubishi Shokuhin Co., Ltd.	1-1, Koishikawa 1-chome, Bunkyo-ku, Tokyo	Wholesaling of processed foods, frozen and chilled foods, alcoholic beverages and confectionery	https://www.mitsubishi-shokuhin.com/en/
Heinz Japan Ltd.	11F CS Tower, 5-20-8 Asakusabashi, Taito-ku, Tokyo	Manufacturing and sale of sauces and condiments	https://www.heinz.com/ja-JP
S&B FOODS INC.	18-6, Nihonbashi Kabuto-cho, Chuo-ku, Tokyo	Manufacture and sale of spices, spice pastes, herbs, spiced preparations, instant foods, etc.	https://www.sbfoods-worldwide.com/

Daiei Trading Co., Ltd.	Daini Udagawa Bldg., 3-9, Kanda Jinbocho, Chiyoda-ku, Tokyo	Trading company specializes in Chinese condiments	https://daieitc.co.jp/
Japan Salt K.K.	21F Marunouchi Nijubashi Building, 3-2-3 Marunouchi, Chiyoda-ku, Tokyo	Procurement and sale of salt, importing and exporting of salt, procurement and sale of foods and drinking water, food manufacturing and processing, etc.	https://japan-salt.co.jp/

6. Dry Pulses

Key points of the market trend and characteristics

- **While adzuki beans and certain types of kidney beans (such as red and white kidney beans) are produced domestically, Japan imports about half of its supply. To protect local production, Japan adopts a tariff quota system for those products and imposes low or no tariffs only up to a certain import volume. Imports are increased if domestic production is insufficient or if prices rise due to adverse weather conditions. Otherwise, the volume of imports is maintained at a set level.**

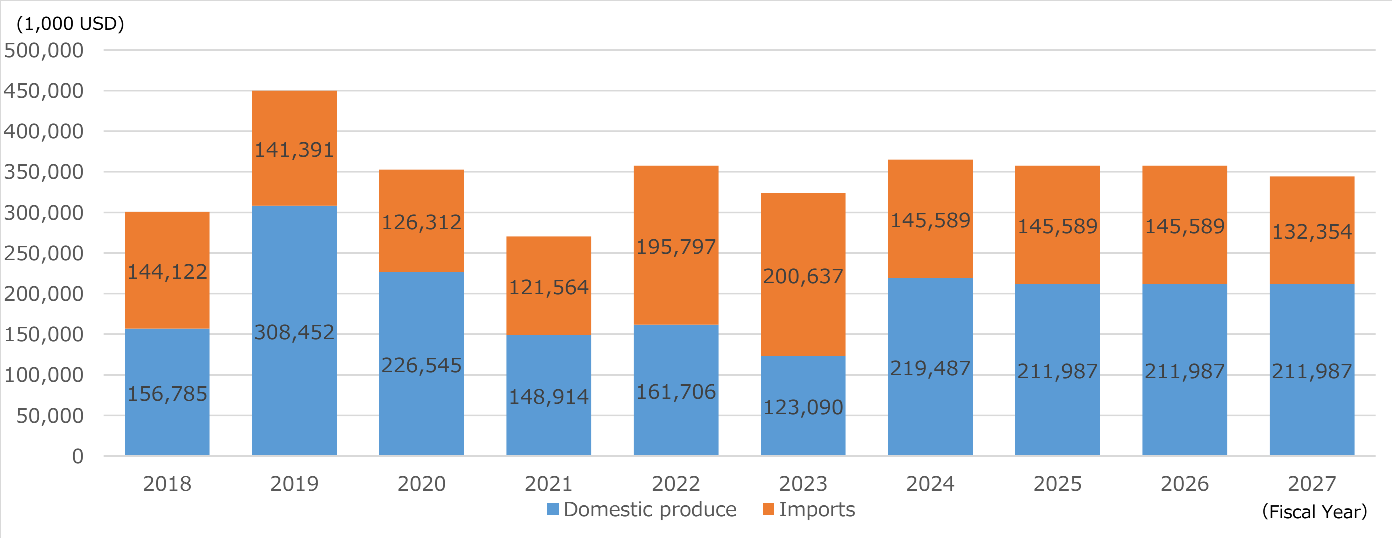
- **In recent years, overall demand for dry pulses, including both domestic production and imports, has been gradually declining. One key factor contributing to this trend is the decreasing population of pulse consumers. Adzuki beans, a staple in traditional Japanese sweets, are the most commonly consumed type of pulse in Japan. However, wagashi (traditional Japanese sweets) are primarily enjoyed daily by seniors over the age of 60. Younger Japanese, particularly those in their 20s and 30s, are more inclined to favor Western-style sweets like chocolates and cakes over traditional wagashi.**

- **In addition to adzuki beans, lima beans (Phaseolus lunatus) imported largely from Myanmar and the U.S. are used to make white bean paste for wagashi. However, due to their high cyanide content, Japan's Food Sanitation Law limits the distribution and use of lima beans to bean paste manufacturers only. These beans are not available for sale to the general public.**

- **Increasing consumption of pulses is a challenge. In addition to Japanese sweets (wagashi), pulses are traditionally eaten as a side dish in everyday meals, often simmered and sweetened. However, the consumption of sweetened, simmered beans is declining as Japanese cuisine becomes more Westernized. On the other hand, chickpeas and lentils are primarily used in Western dishes, and demand for these pulses is expected to grow, particularly among younger generations.**

Market Size

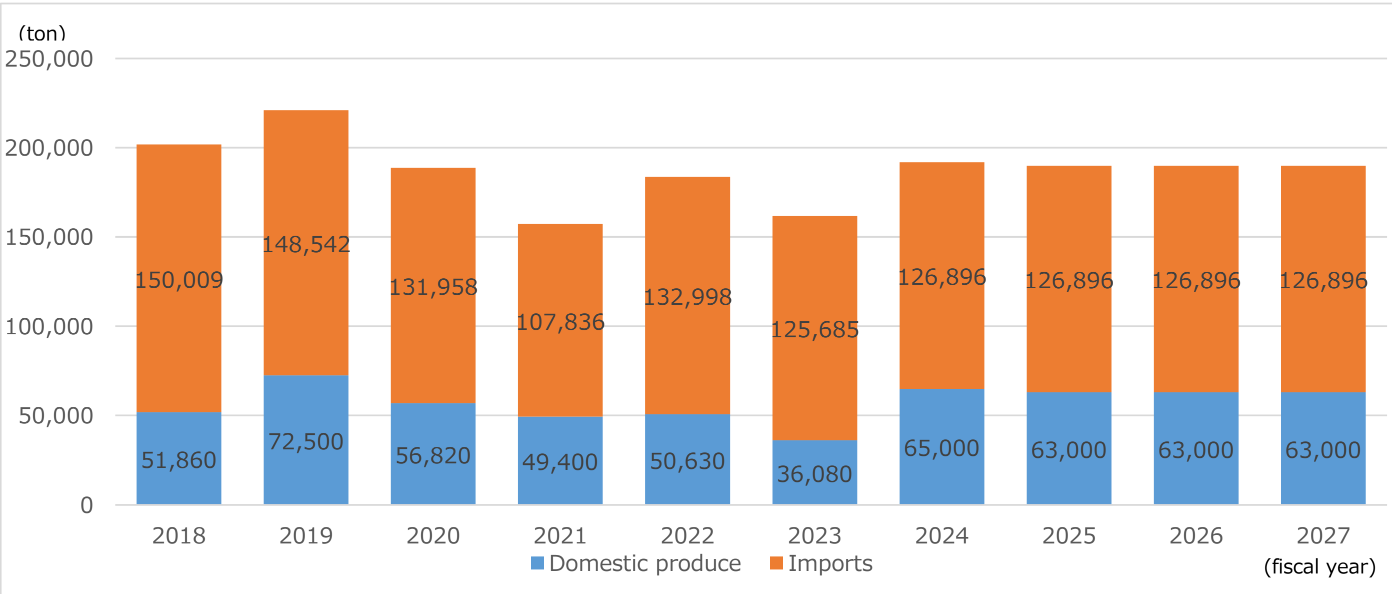
MARKET SIZE TRANSITION（BY VALUE, FY2018 TO FY2027）



(Unit: 1,000 USD)	Fiscal Year 2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	CAGR 2018-2027
Dry pulses (total)	300,907	449,842	352,857	270,478	357,503	323,727	365,076	357,576	357,576	344,341	1.5%
Year-on-Year	88.1	149.5	78.4	76.7	132.2	90.6	112.8	97.9	100.0	96.3	
Domestic produce	156,785	308,452	226,545	148,914	161,706	123,090	219,487	211,987	211,987	211,987	3.4%
Year-on-Year	84.5	196.7	73.4	65.7	108.6	76.1	178.3	96.6	100.0	100.0	
Imports	144,122	141,391	126,312	121,564	195,797	200,637	145,589	145,589	145,589	132,354	-0.9%
Year-on-Year	92.4	98.1	89.3	96.2	161.1	102.5	72.6	100.0	100.0	90.9	

*Fiscal year for domestic produce Oct- Sep; for Imports, Jan-Dec.
*Figures for FY2023 and beyond are the forecasts.
(Estimated by Yano Research Institute)

MARKET SIZE TRANSITION (BY VOLUME, FY2018 TO FY2027)



(Unit: ton)	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	CAGR 2018-2027
	Fiscal Year										
Dry pulses	201,869	221,042	188,778	157,236	183,628	161,765	191,896	189,896	189,896	189,896	-0.7%
Year-on-Year	97.6	109.5	85.4	83.3	116.8	88.1	118.6	99.0	100.0	100.0	
Domestic produce	51,860	72,500	56,820	49,400	50,630	36,080	65,000	63,000	63,000	63,000	2.2%
Year-on-Year	73.8	139.8	78.4	86.9	102.5	71.3	180.2	96.9	100.0	100.0	
Imports	150,009	148,542	131,958	107,836	132,998	125,685	126,896	126,896	126,896	126,896	-1.8%
Year-on-Year	109.8	99.0	88.8	81.7	123.3	94.5	101.0	100.0	100.0	100.0	

*Fiscal year for domestic produce Oct- Sep; for Imports, Jan-Dec.
*Figures for FY2023 and beyond are the forecasts.
(Estimated by Yano Research Institute)

- **In view of dry pulses by volume, while adzuki beans and some kidney beans (red kidney beans, white kidney beans) are domestically produced, Japan imports roughly half of the demand. From the standpoint of protecting domestic production, free or low tariffs are applied only to a certain import volume. Japan increases on a condition that domestic production falls short and/or prices soar due to bad weather. Otherwise, import volume is kept at a certain level.**
- **Overall demand for dry pulses in the last few years, including domestic produce and imports, has been trending slightly downward. A reason behind the decline is the decrease in the population that consume pulses. A most consumed variety of pulses in Japan is adzuki beans, which is a major ingredient for traditional Japanese sweets (referred to as "wagashi" hereafter). However, wagashi is enjoyed on daily basis mostly by seniors over sixty. Younger Japanese in their 20s and 30s tend to prefer Western-style sweets such as chocolates and cakes over wagashi.**
- **In view of the market from supply side, the typhoon in 2016 and bad weather in 2018 had a profound impact on the stock of domestic produce. The price of Japanese adzuki beans soared between FY2018 and FY2019 (the price of adzuki beans in 2019 soared to 1.6 times that of 2017), expanding the dry pulses market by value. Because of a rapid price hike, Japan became more dependent on imports for dry pulses. However, the stock of dry pulses increased in FY2020 and FY2021, because despite the marked decline in the gift demand including confectionery souvenirs (stemming from pandemic restrictions on social activities) crop yields stayed at the same level as in preceding years. In FY2023, the summer heatwave reduced the crop yield again, but this time the domestic produce stocked up till FY2022 was enough to cover the shortage. Because of the demand shift from imports to domestic produce, imported dry pulses are slightly overstocked.**
- **In addition to adzuki beans, lima beans (Phaseolus lunatus) imported typically from Myanmar and the U.S. are also used to make white bean paste for wagashi. However, due to its high cyanide content, the Food Sanitation Law restricts the distribution/use of lima beans in Japan to bean paste producers only. They are not distributed in the general market (for consumers).**
- **Besides wagashi, it has been a tradition of Japan to eat simmered pulses. Pulses like kidney beans, pinto beans, and Phaseolus vulgaris are simmered and sweetened with sugar. Nevertheless, as seen in wagashi, the consumption of simmered beans is also diminishing due to the Westernization of daily cuisine.**
- **Since chickpeas and lentils are mostly used in Western recipes, the demand for these pulses is expected to grow among young people.**

TRANSITION OF TOTAL IMPORT SIZE PER COUNTRY（HS CODE-BASED; FY2018 TO FY2023; VALUE & VOLUME）

《Import value transition》

2023 Ranking	unit: (1,000 USD) Country name	Year 2018	2019	2020	2021	2022	2023	CAGR 2018-2023
1	China	85,042	73,701	65,019	63,261	97,618	91,807	1.5%
2	Canada	18,183	27,622	26,918	28,173	33,802	46,351	20.6%
3	Myanmar	19,105	16,829	15,077	11,080	27,600	28,906	8.6%
4	United States	12,714	13,581	11,964	9,296	10,837	10,234	-4.2%
24	Türkiye	78.7	71.2	89.9	42.0	51.0	77.1	-0.4%
	Other	9,078	9,657	7,335	9,753	25,941	23,340	20.8%
	Total	144,122	141,391	126,312	121,564	195,797	200,637	6.8%
	Year-on-Year（%）	92.4	98.1	89.3	96.2	161.1	102.5	

*Cumulative total, from January to December

*Share of top 4 countries: 88.4% (2023)

*Import from Türkiye: 10M yen, share 0.04%, ranked 24th (2023)

- The total value of imports of dry pulses in 2023 showed a CAGR of 6.8% over the last 5 years to $200,637 thousand USD, up 2.5% from the preceding year. While the volume has declined (which will be explained in the later section of this report), the global price hike, the rise of logistics cost, and the weak yen have seemingly contributed to the increase in the total value of imports.
- By country, China ranked first in 2023 with a share of 45.8%, followed by Canada 23.1%, Myanmar 14.4%, and the U.S. 5.1%. These four countries occupied almost 90% of the imports.
- Rise of Canada's share in the last 5 years attributes to the increase of imported adzuki beans. Canada produces a variety that is also produced in Japan ("Erimoshozu"), which is distributed in Japan at a price range in between that of domestic adzuki beans and Chinese adzuki beans. While Chinese adzuki beans occupy the majority of imported adzuki beans, Canada has been successful in meeting the demands of Japanese importers who want to keep prices down while avoiding Chinese adzuki beans, against the backdrop of the tendency of Japanese consumers reluctant in buying Chinese products.

《Import volume transition》

2023 Ranking	unit: ton Country name	Year 2018	2019	2020	2021	2022	2023	CAGR 2018-2023
1	China	75,137	66,368	56,191	40,728	49,207	48,202	-8.5%
2	Canada	22,273	32,160	32,159	31,712	28,045	29,997	6.1%
3	Myanmar	26,558	23,379	21,755	15,852	27,193	24,486	-1.6%
4	United States	13,496	13,690	12,558	8,484	7,941	5,966	-15.1%
23	Türkiye	67	126	97	41	42	49	-6.1%
	Other	12,478	12,820	9,198	11,019	20,570	16,985	6.4%
	Total	150,009	148,542	131,958	107,836	132,998	125,685	-3.5%
	Year-on-Year (%)	109.8	99.0	88.8	81.7	123.3	94.5	

*Cumulative total, from January to December

*Share of top 4 countries: 86.5% (2023)

*Import from Türkiye: 49 t , share 0.04%, ranked 23rd (2023)

- In 2023, import volume fell by 5.5% from the prior year to 125,685 tons, reflecting a compound annual growth rate (CAGR) of -3.5% over the last five years. Pandemic disruptions in port operation and the decline in domestic demand diminished the import volume in 2020-2021. Although the volume rebounded in 2022 in reaction to the droppage, it decreased again in 2023 against the background of rising import prices owing to the weak yen, as well as to the ample stock of domestically produced adzuki beans that stimulated the demand for domestic produce.

《Import volume transition by variety》

2023 Ranking	unit: (ton) Variety	Year 2018	2019	2020	2021	2022	2023	CAGR 2018-2023
1	Mung beans	72,548	56,638	52,580	38,723	52,207	52,473	-6.3%
2	Adzuki beans	21,347	31,850	25,515	22,672	29,857	28,933	6.3%
3	Kidney beans	12,208	13,691	12,836	12,258	12,595	12,398	0.3%
4	Peas	16,949	17,763	18,563	15,502	13,951	11,616	-7.3%
5	Broad beans	4,618	4,906	3,682	2,848	3,778	2,870	-9.1%
6	Chickpeas	2,348	2,386	2,390	1,704	1,919	1,884	-4.3%
7	Lentils	595	821	984	677	991	990	10.7%
	Other	19,397	20,486	15,408	13,452	17,699	14,522	-5.6%
	Total	150,009	148,542	131,958	107,836	132,998	125,685	-3.5%
	Year-on-Year (%)	109.8	99.0	88.8	81.7	123.3	94.5	

*Cumulative total, from January to December

*** Note: In this report, white oval beans botanically classified as Phaseolus vulgaris, which may include beans generally called common bean, navy bean, white pea bean, pea bean, great northern bean, or red kidney beans, are indicated as "kidney beans" to be consistent with the category used in tariff system (HS code 0713.11).*

- In light of the import volume by variety, the most imported variety in 2023 was mung beans, representing 41.3%, followed by adzuki beans, 23.0%. Mung beans are primarily used for growing bean sprouts, while adzuki beans are the variety most commonly eaten as whole beans.

《Unit price transition》

	Fiscal year						CAGR
	2018	2019	2020	2021	2022	2023	2018-2023
Unit price (US$/kg)	**1.0**	**1.0**	**1.0**	**1.1**	**1.5**	**1.6**	**10.7%**
Y-o-Y (%)	**0.8**	**1.0**	**1.0**	**1.2**	**1.3**	**1.1**	

- While the unit price of dry pulses had been around $1.0 USD/kg until 2020, showing no obvious change, the price slightly rose to $1.1 USD/kg in 2021. It has shown an upward trend since then, and continuous and gradual increases to $1.5 USD/kg in 2022 and $1.6 USD/kg in 2023 were seen.
- The outbreak of the war between Russia and Ukraine in 2022 worsened the global supply-demand balance of grains, and planting acreage was increased for wheat, corn, and some other products in North America, one of the major production regions, and China. Consequently, the planting acreage of pulses such as red beans (or Azuki beans) , the demand of which is relied largely on imports in Japan, was decreased, and increasing trend in the red bean price has been observed. Further, progress of yen depreciation led to increase of import cost and resulting unit price increase of dry pulses.

Key Information for Exporting to Japan

TARIFFS (HS CODE-BASED)

■Tariff Quota System

- **Under the tariff quota system, duty-free or low tariff rates (primary tariff rates) are applied to imports within a certain volume quota to ensure the supply of affordable imports to actual demanders, while high tariff rates (secondary tariff rates) are applied to imports exceeding the primary tariff volume quota to protect the benefits of domestic producers and processors. This system has been in place since FY1995, based on The General Agreement on Tariffs and Trade (GATT). The total quota (the volume of a specific agricultural commodity that may be imported with a lower tariff) is 120,000 tons for all pulses except chickpeas, mung beans, broad beans, and soybeans/pigeon peas. In the Tariff Schedule, this is referred to as the "pooled quota".**
- **The primary tariff rate was set at 10% and the secondary tariff rate was set at 354yen/kg since 2000. However, as TPP11, EU-Japan EPA, and Japan-US trade agreement came into effect in December 2018, in February 2019, and in January 2020, respectively, the primary tariff rate (10%) for countries subject to the treaties have been terminated. Secondary tariff rate remains effective even after the issuance of each EPA/FTA.**
- **Under the tariff quota system, the basic idea is to apply the primary rate for the quantity needed to fill the gap between the demand and supply by domestic production (the quantity that cannot be met by domestic production). If there is no significant fluctuation in the demand volume, the quota quantity will change in accordance with the fluctuations in domestic production volume.**

<Pooled Quota in Last 5 Fiscal Years>

(Unit : ton)	Fiscal Year					
	2018	2019	2020	2021	2022	2023
Adzuki beans	33,580	29,960	22,200	23,100	31,299	22,302
Kidney beans	37,800	32,400	26,200	28,500	32,800	30,819
Peas, broad beans	44,920	54,179	68,496	59,838	45,488	60,659
Okinawa	3,700	3,700	3,700	3,700	3,700	3,700
New demand	-	-	-	4,862	6,713	2,520
Dry pulses total	120,000	120,239	120,596	120,000	120,000	120,000

(Source: MAFF)

PULSES SUBJECT TO TARIFF QUOTA SYSTEM

1. PEAS (PISUM SATIVUM)

*General or Temporary rate shall be applied unless a specific tariff rate is shown in the tables below.

Statistical code		Description	Tariff rate						
HS			Türkiye	General	Temporary	ASEAN	CPTPP	EU	US
0713.10		Peas (Pisum sativum)							
	010	1 Rendered suitable solely for sowing by chemical treatment (for example, sterilization, acceleration of germination)	Free	Free		Free	Free	Free	
		2 Other							
	211	(1) Certified as seeds for the sowing vegetables in accordance with the provisions of a Cabinet Order	3%	10%		Free	Free	Free	Free
		(2) Other	417 yen/kg	417yen/kg					
	221	- For "the Pooled Quota"	10%		10%		Free	Free	Free
	229	- Other	354 yen/kg				128.73yen/kg	128.73yen/kg	

2. SMALL RED ADZUKI BEANS (PHASEOLUS OR VIGNA ANGULARIS)

Statistical code		Description	Tariff rate						
HS			Türkiye	General	Temporary	ASEAN	CPTPP	EU	US
0713.32		Small red (Adzuki) beans (Phaseolus or Vigna angularis)	417 yen/kg	417yen/kg					
	010	- For "the Pooled Quota"	10%		10%		Free	Free	Free
	090	- Other	354 yen/kg				354yen/kg		

3. KIDNEY BEANS, INCLUDING WHITE PEA BEANS (PHASEOLUS VULGARIS)

Statistical code		Description	Tariff rate						
HS			Türkiye	General	Temporary	ASEAN	CPTPP	EU	US
0713.33		Kidney beans, including white pea beans (Phaseolus vulgaris)							
	010	1 Rendered suitable solely for sowing by chemical treatment (for example, sterilization, acceleration of germination)	Free	Free		Free	Free	Free	
		2 Other							
	210	(1) Certified as seeds for sowing vegetables in accordance with the provisions of a Cabinet Order	3%	10%		Free	Free	Free	Free
		(2) Other	417 yen/kg	417yen/kg					
	221	- For "the Pooled Quota"	10%		10%		Free	Free	Free
	229	- Other	354 yen/kg				354yen/kg		

4. BAMBARA BEANS (VIGNA SUBTERRANEA OR VOANDZEIA SUBTERRANEA)

Statistical code		Description	Tariff rate						
HS			Türkiye	General	Temporary	ASEAN	CPTPP	EU	US
0713.34		Bambara beans (Vigna subterranea or Voandzeia subterranea)							
	100	1 Rendered suitable solely for sowing by chemical treatment (for example, sterilization, acceleration of germination)	Free	Free		Free	Free	Free	
		2 Other							
	210	(1) Certified as seeds for sowing vegetables in accordance with the provisions of a Cabinet Order	3%	10%		Free	Free	Free	
		(2) Other	417 yen/kg	417yen/kg					
	291	- For "the Pooled Quota"	10%		10%		Free	Free	
	299	- Other	354 yen/kg				354yen/kg		

5. COW PEAS (VIGNA UNGUICULATA)

Statistical code		Description	Tariff rate						
HS			Türkiye	General	Temporary	ASEAN	CPTPP	EU	US
0713.35		Cow peas (Vigna unguiculata)							
	100	1 Rendered suitable solely for sowing by chemical treatment (for example, sterilization, acceleration of germination)	Free	Free		Free	Free	Free	
		2 Other							
	210	(1) Certified as seeds for sowing vegetables in accordance with the provisions of a Cabinet Order	3%	10%		Free	Free	Free	Free
		(2) Other	417 yen/kg	417yen/kg					
	291	- For "the Pooled Quota"	10%		10%		Free	Free	Free
	299	- Other	354 yen/kg				354yen/kg		

6. OTHER (VIGNA SPP., PHASEOLUS SPP.)

Statistical code		Description	Tariff rate						
HS			Türkiye	General	Temporary	ASEAN	CPTPP	EU	US
0713.39		Other (Beans (Vigna spp., Phaseolus spp.) :)							
	010	1 Rendered suitable solely for sowing by chemical treatment (for example, sterilization, acceleration of germination)	Free	Free		Free	Free	Free	
		2 Other							
	210	(1) Certified as seeds for sowing vegetables in accordance with the provisions of a Cabinet Order	3%	10%		Free	Free	Free	
		(2) Other	417 yen/kg	417yen/kg					
		- For "the Pooled Quota"	10%		10%				
	221	-- Pegin beans (Phaseculus calcaratus)					Free	Free	
	226	-- Other					Free	Free	Free
		- Other	354 yen/kg						
	222	-- Pegin beans (Phaseculus calcaratus)					354yen/kg		
	227	-- Other					354yen/kg		

7. BROAD BEANS (VICIA FABA VAR. MAJOR) AND HORSE BEANS (VICIA FABA VAR. EQUINA, VICIA FABA VAR. MINOR)

Statistical code		Description	Tariff rate						
HS			Türkiye	General	Temporary	ASEAN	CPTPP	EU	US
0713.50		Broad beans (Vicia faba var. major) and horse beans (Vicia faba var. equina, Vicia faba var. minor)							
	010	1 Rendered suitable solely for sowing by chemical treatment (for example, sterilization, acceleration of germination)	Free	Free		Free	Free	Free	
		2 Other							
	210	(1) Certified as seeds for sowing vegetables in accordance with the provisions of a Cabinet Order	3%	10%		Free	Free	Free	Free
		(2) Other	417 yen/kg	417yen/kg					
	221	- For "the Pooled Quota"	10%		10%		3.60%	3.60%	
	229	- Other	354 yen/kg				128.73yen/kg	128.73yen/kg	

PULSES NOT SUBJECT TO TARIFF QUOTA SYSTEM

1. CHICKPEAS (GARBANZOS)

Statistical code		Description	Tariff rate						
HS			Türkiye	General	Temporary	ASEAN	CPTPP	EU	US
0713.20		Chickpeas (garbanzos)							
	010	1 Rendered suitable solely for sowing by chemical treatment (for example, sterilization, acceleration of germination)	Free	Free		Free	Free	Free	
	020	2 Other	4.3%	10%		Free	Free	Free	Free
		Beans (Vigna spp., Phaseolus spp.) :							

2. BEANS OF THE SPECIES VIGNA MUNGO (L.) HEPPER OR VIGNA RADIATA (L.) WILCZEK

Statistical code		Description	Tariff rate						
HS			Türkiye	General	Temporary	ASEAN	CPTPP	EU	US
0713.31	000	Beans of the species Vigna mungo (L.) Hepper or Vigna radiata (L.) Wilczek	Free	Free		Free	Free	Free	

3. LENTILS

Statistical code		Description	Tariff rate						
HS			Türkiye	General	Temporary	ASEAN	CPTPP	EU	US
0713.40		Lentils							
	010	1 Rendered suitable solely for sowing by chemical treatment (for example, sterilization, acceleration of germination)	Free	Free		Free	Free	Free	
	020	2 Other	4.3%	10%		Free	Free	Free	Free

4. PIGEON PEAS (CAJANUS CAJAN)

Statistical code		Description	Tariff rate						
HS			Türkiye	General	Temporary	ASEAN	CPTPP	EU	US
0713.60		Pigeon peas (Cajanus cajan)							
	100	1 Rendered suitable solely for sowing by chemical treatment (for example, sterilization, acceleration of germination)	Free	Free		Free	Free	Free	
		2 Other							
	210	(1) Certified as seeds for sowing vegetables in accordance with the provisions of a Cabinet Order	3%	10%		Free	Free	Free	
		(2) Other	417 yen/kg	417yen/kg					
	291	- For "the Pooled Quota"	10%		10%		3.60%	3.60%	
	299	- Other	354 yen/kg				128.73yen/kg	128.73yen/kg	

5. OTHER BEANS

Statistical code		Description	Tariff rate						
HS			Türkiye	General	Temporary	ASEAN	CPTPP	EU	US
0713.90		Other							
	010	1 Rendered suitable solely for sowing by chemical treatment (for example, sterilization, acceleration of germination)	Free	Free		Free	Free	Free	
		2 Other							
	210	(1) Certified as seeds for sowing vegetables in accordance with the provisions of a Cabinet Order	3%	10%		Free	Free	Free	
		(2) Other	417 yen/kg	417yen/kg					
	221	- For "the Pooled Quota"	10%		10%		3.60%	3.60%	
	229	- Other	354 yen/kg				128.73yen/kg	128.73yen/kg	

RELATED LEGAL SYSTEMS, REGULATIONS

Food Sanitation Act

(https://www.mhlw.go.jp/stf/seisakunitsuite/bunya/0000144562.html)

Main items	Regulatory authority	Regulations when importing
Food (confectionery, beverages, etc.) water, food additives, supplements, etc.	Ministry of Health, Labour and Welfare (MHLW)	Notification must be made to MHLW

《Outline》

- **The Food Sanitation Act aims to prevent sanitation hazards resulting from eating and drinking and to ensure food safety thereby protecting citizens' health. The Act also applies to imported foods.**
- **A person who intends to import food, etc. for the purpose of sale or to use in business is obliged to make an import notification from this perspective to ensure food safety, based on Article 27 of the Food Sanitation Act.**
- **Notifications are accepted at the quarantine station, where a food sanitation inspector examines the foods and products to confirm their compliance with the criteria and standards of the Food Sanitation Act, and the necessity of an inspection. (A consultation service is available.)**

《Notification procedures》

(1) Preparing for documents needed for the notification:
- ◆ Notification Form for Importation of Foods, etc.
- ◆ Other documents
  - · Description of raw materials and manufacturing processes (processed foods, etc., as required)
  - · Health (sanitary) certificate (as required)
  - · Test results (as required)

(2) Submit the completed Notification Form and other documentation to the quarantine station responsible for the port of import.

(3) The notification form and other documentation submitted are examined by a food sanitation inspector based on legislation to determine the necessity of inspections.

(4) When the document examination and cargo inspection have found that the cargo conforms to the act (the cargo "passed" the inspection), a "Certificate of Notification" will be returned to the importer from the MHLW quarantine station where the notification was first submitted.

《Recent amendments to the Food Sanitation Act》

· To secure food safety against changes in environment surrounding food and food internationalization, the Food Sanitation Act has been amended in 2019 as follows:

(8) Reinforcement of wide-area food poisoning incident response

(9) Institutionalization of sanitation control in compliance with HACCP

(10) Obligation to notify health damage incident caused by intake of their food products containing the designated ingredients or components

(11) Introducing a positive list system for food containers and packaging
Reference of lists:
https://www.mhlw.go.jp/content/11130500/000638983.xlsm
https://www.mhlw.go.jp/content/11130500/000635356.xlsx

(12) Revision of licensing system and establishment of notification system for food business

(13) Obligation to notify food recall information to the government

(14) Further enhancement of import and export food safety certification:

For the purpose to confirm that the inspections and control have properly been conducted in the exporting countries for insurance of safety of imported foods, sanitation control based on HACCP and attachment of sanitation certificates of dairy products or aquatic food are required as a requisite of import.

《Other key points to notify》

- Due to its high cyanide content, the Food Sanitation Law restricts the distribution/use of lima beans, except for the use as raw materials for production of raw bean pastes. Distribution to the public is not permitted. Precaution is required particularly in transportation, as cyanogenic glycosides in lima beans may increase when they are stressed.

- Food additives and pesticide residues of pulses are also restricted by the Food Sanitation Law. A positive list is provided here because of frequent violations of food additives and pesticide residues in imported foods. Particular attention should be paid to pulses, as multiple instances of non-compliance with Japanese food safety laws have been identified often. Violations are mostly stemming from the lack of understanding on the Japanese Food Sanitation Law and improper management of pesticide use.

Food additives

- Food additives such as preservatives, sweeteners, colorants, and flavoring agents used in the process of food production or for the purpose of food processing and preservation are also regulated under the Food Sanitation Act. MHLW allows the use of food additives only when they have been judged by the Food Safety Commission as not inflicting any risks on human health, and only after specifying standards for ingredients and criteria for their use. MHLW also strives to ensure the safety of food additives that have been approved for use by, for example, surveying the per capita intake of food additives. See below for the positive list of food additives.

Excel https://www.mhlw.go.jp/content/001031538.xlsx

Pesticide residue

- To ensure that pesticide remained in food not to inflict on human health, MHLW sets the residue standards for all agricultural chemicals, feed additives, and animal drugs. The residue standards are set by the Food Safety Commission for each food within the range of amount not harmful to intake. Any foods with agricultural chemicals, etc. remained at the level surpassing the standard are banned for sale or import by the Food Sanitation Act.

- To ensure pesticide residues do not exceed standards, the Ministry of Agriculture, Forestry and Fisheries (MAFF) sets standards for use according to the Agricultural Chemicals

Regulation Act in accordance with residue standards. In addition, when food products are imported, they are inspected for pesticide residues at the quarantine station.

For the search on pesticide residue standard values: https://db.ffcr.or.jp/front/

Food Labeling Act（https://www.caa.go.jp/en/policy/food_labeling/）

Main items	Regulatory authority	Measures to take
All food items sold for consumers, etc.	Consumer Affairs Agency	Labeling on container packages in Japanese language

《Labeling details》

・ Following nine items are needed to be labeled for foods sold to consumers:

Items to label	Descriptions
1. General name	Indicate common name that expresses the process food contents.
2. Storage condition	Storage condition of the product before opening the package should be indicated in accordance with the characteristics of the food, such as “Store at room temperature out of direct sunlight,” “Store at 10°C or below”, etc.
3. Use by date or Best before date	Label “use by date” for foods that are quick to deteriorate in quality, while label “best before date” for all other foods.
4. Ingredients used	・ Indicate the most common name of raw materials used, in descending order of percentage by weight. ・ For composite materials that comprise two or more of raw materials, list all materials in descending order of percentage by weight within the parentheses after the composite material name.
5. Additives	Indicate the name of substance for additives, in descending order of percentage by weight, except for those used for nutritious enhancement, processing aids, or those that can be applied to the “carry-over” principle.
6. Content or solid volume and total content	Indicate content weight, content volume, or content quantity. Content weight should be labeled in grams or kilograms, content volume in milliliters or liters, and content quantity in units such as number of pieces.
7. Amount and calorific value of nutrients	For consumer processed foods, calories, amount of protein, fat, carbohydrate, and sodium should be indicated.
8. Name and address of food business operator	Of food business operators, indicate the name and address of the person who is responsible for food labeling descriptions.
9. Location of manufacturing or processing plant and name of manufacturer or processor, etc.	Indicate the location of manufacturing or processing plant and the name of manufacturer or processer. For imported products, indicate the location of the importer’s office and the name of the importer.

- In addition to the above, some items need to be indicated if certain requirements are met. The following two items need particular notice.

Items to indicate	Descriptions
Allergen	· Allergen labeling is mandatory for processed foods made from specified raw materials and foods containing additives derived from specified raw materials. · Allergen labeling is recommended for processed foods made from ingredients equivalent to specified raw materials. **Mandatory to label - Specific 8 ingredients:** Shrimp, crab, walnut, wheat, soba (buckwheat), eggs, milk, peanut **Recommended to label – 20 ingredients equivalent to specified raw materials:** Almond, abalone, squid, salmon roe, orange, cashew nut, kiwi fruit, beef, sesame, salmon, mackerel, soybean, chicken, banana, pork, macadamia nut, peach, yam, apples, gelatin
Country of origin	For imported products, name of the country of origin should be indicated.

(Source: "An Introduction of Rule in Japan "Food Labeling Guide" - Aiming for Food Safety and Reliability" by Food Labeling Certification Association, Consumer Affairs Agency)

Market Information

MARKET TRENDS IN RECENT YEARS

《Transition & Forecast of Domestic Produce Volume by Variety》

	Fiscal Year										CAGR
(Unit: ton)	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2018-2027
Domestic Production	51,860	72,500	56,820	49,400	50,630	36,080	65,000	63,000	63,000	63,000	2.2%
Year-on-Year	73.8	139.8	78.4	86.9	102.5	71.3	180.2	96.9	100.0	100.0	
Adzuki beans	42,100	59,100	51,900	42,200	42,100	30,900	55,000	55,000	55,000	55,000	3.0%
Year-on-Year	78.8	140.4	87.8	81.3	99.8	73.4	178.0	100.0	100.0	100.0	
Kidney Beans	9,760	13,400	4,920	7,200	8,530	5,180	10,000	8,000	8,000	8,000	-2.2%
Year-on-Year	57.8	137.3	36.7	146.3	118.5	60.7	193.1	80.0	100.0	100.0	

*Fiscal year for domestic produce Oct- Sep

*Figures for FY2023 and beyond are the forecasts.

(Estimated by Yano Research Institute)

- Viewing the domestic pulse production, adzuki beans occupy the majority of the production. Kidney beans and Ootebo are also produced but the crop yields are declining year by year due to aging of farmers and labor-intensive nature of growing these beans. The total production volume of adzuki beans and kidney beans in FY2023 dropped to almost 70 percent of the preceding fiscal year to 36,080 tons. The decline was due to lingering summer heat, which hindered bean pods from drying for harvesting. Delays in harvesting resulted not only in a variation of quality, but also in decrease of bean size. To maintain crop yield, the number of contract farming between farmers (producers) and buyers (demanders) is growing for the production of pulses, such as adzuki beans and kidney beans.

- Domestically produced adzuki beans are used by traditional Japanese sweets specialty stores, whose products are sold mainly at department stores or their own wagashi shops. Although there is a steady demand, the demand is trending downward because the customer base of wagashi is not growing compared to Western sweets (mostly elderly people), as well as due to the social trend of eliminating "empty" formalities (which declined the gift demand). Same can be said for simmered beans. With a majority of consumers being elderly, the market is marginally declining.

《Transition & Forecast of Pulse Import Volume by Variety》

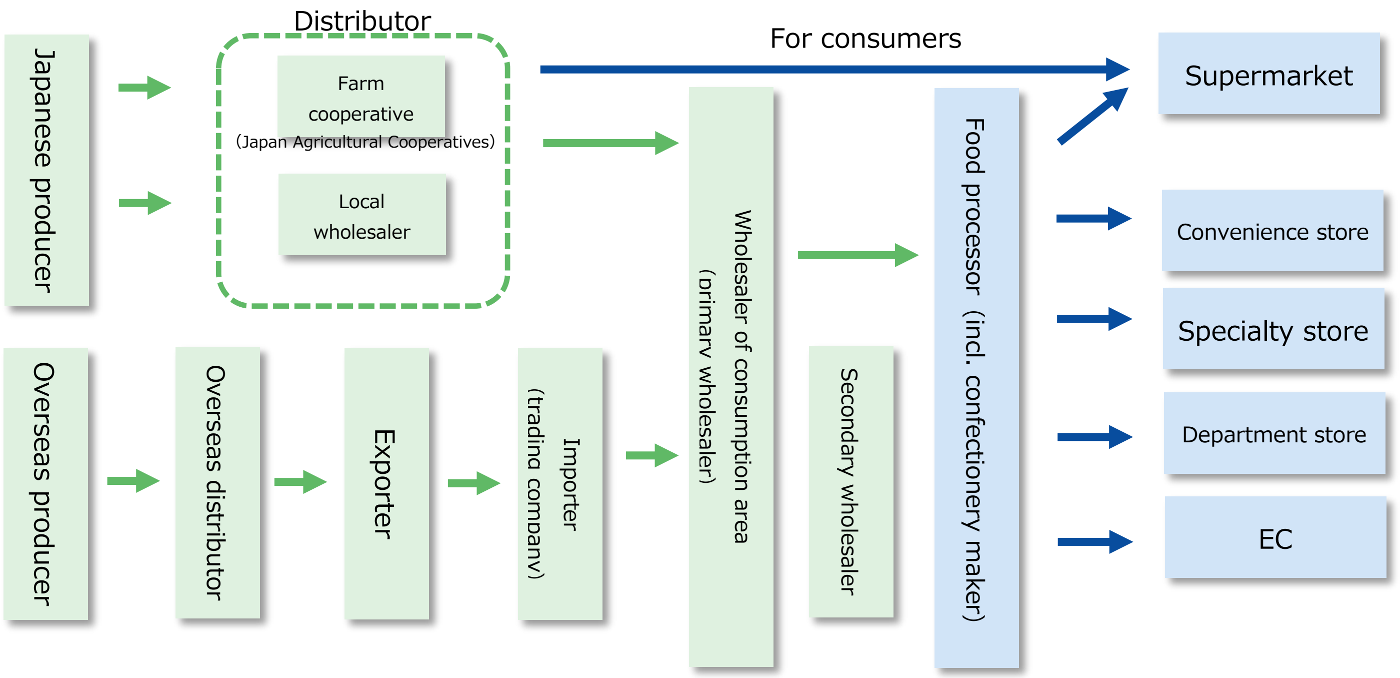
(unit: ton)	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	CAGR 2018-2027
	Year										
Import volume	150,009	148,542	131,958	107,836	132,998	125,685	126,896	126,896	126,896	126,896	-1.8%
Year-on-Year	109.8	99.0	88.8	81.7	123.3	94.5	101.0	100.0	100.0	100.0	
Mung beans	72,548	56,638	52,580	38,723	52,207	52,473	52,000	52,000	52,000	52,000	-3.6%
Year-on-Year	120.7	78.1	92.8	73.6	134.8	100.5	99.1	100.0	100.0	100.0	
Adzuki beans	21,347	31,850	25,515	22,672	29,857	28,933	29,000	29,000	29,000	29,000	3.5%
Year-on-Year	100.3	149.2	80.1	88.9	131.7	96.9	100.2	100.0	100.0	100.0	
Kidney beans	12,208	13,691	12,836	12,258	12,595	12,398	12,500	12,500	12,500	12,500	0.3%
Year-on-Year	108.4	112.2	93.8	95.5	102.7	98.4	100.8	100.0	100.0	100.0	
Peas	16,949	17,763	18,563	15,502	13,951	11,616	12,000	12,000	12,000	12,000	-3.8%
Year-on-Year	95.2	104.8	104.5	83.5	90.0	83.3	103.3	100.0	100.0	100.0	
Broad beans	4,618	4,906	3,682	2,848	3,778	2,870	4,000	4,000	4,000	4,000	-1.6%
Year-on-Year	91.2	106.2	75.1	77.4	132.7	76.0	139.4	100.0	100.0	100.0	
Chickpeas	2,348	2,386	2,390	1,704	1,919	1,884	1,884	1,884	1,884	1,884	-2.4%
Year-on-Year	120.2	101.6	100.2	71.3	112.6	98.2	100.0	100.0	100.0	100.0	
Lentils	595	821	984	677	991	990	990	990	990	990	5.8%
Year-on-Year	81.4	138.0	119.9	68.8	146.5	99.9	100.0	100.0	100.0	100.0	
Other pulses	19,397	20,486	15,408	13,452	17,699	14,522	14,522	14,522	14,522	14,522	-3.2%
Year-on-Year	105.6	105.6	75.2	87.3	131.6	82.1	100.0	100.0	100.0	100.0	

*Cumulative total, from January to December
*Values for 2024 and beyond are the forecasts
(Estimated by Yano Research Institute)

- Out of a total of 125,685 tons of dry pulses imported in 2023, 52,473 tons was mung beans (41.3%), which are chiefly used to grow bean sprouts. Import volume of adzuki beans has been around 30,000 tons/year, representing the share of 23.0%.

- Since the quota system applies to adzuki beans, kidney beans, peas, and broad beans, import volumes of these varieties are restricted, thus will not increase markedly unless domestic crop yield drops significantly. Import volume of chickpeas and broad beans, the varieties exempted of pooled quota, neither has shown marked increase since 2018.

DISTRIBUTION, SALES CHANNEL



(Created by Yano Research Institute)

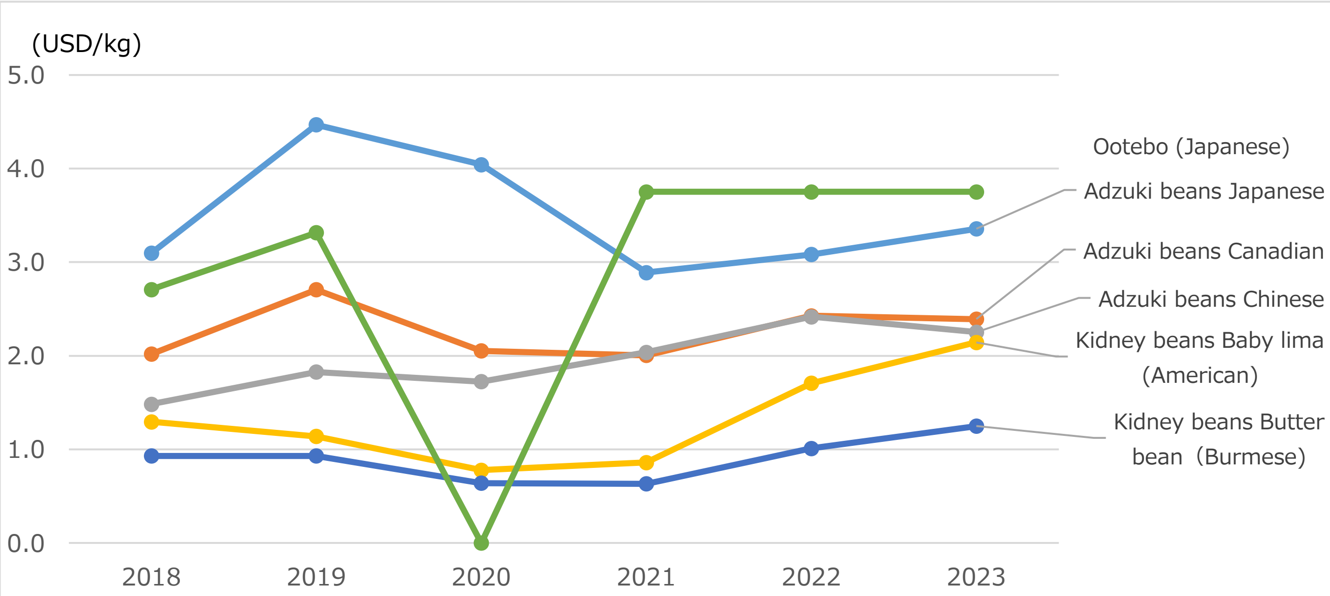
- Domestically produced pulses, except for some that are distributed to supermarkets as commercial products, are mostly distributed to food processors. Dry pulses for food processing are sorted/graded by local distributor, distributed to wholesaler, and provided to food processors. What is unique about Japan regarding pulse consumption is that people sweeten pulses; adzuki beans are used for sweet bean paste (for wagashi and sweet rolls), and kidney beans are used for sweet bean paste and simmered beans. Since domestic produce is priced higher than imports, wagashi using domestic pulses are mostly used for premium confectionery at specialty stores and department stores. Nevertheless, simmered beans are mostly sold at supermarkets.

- Adzuki beans, kidney beans, peas, and broad beans produced overseas are imported by trading companies, and distributed to bean paste makers and confectionery makers via wholesalers. Due to its high cyanide content, the Food Sanitation Law restricts the distribution/use of lima beans, except for the use as raw materials for production of raw bean pastes. For this reason, wholesalers sell lima beans only to the bean paste makers or confectionery makers that have bean paste production equipment. Sweet bean paste made with imported pulses is often used for cheaper wagashi sold at supermarkets and convenience stores. Imported chickpeas and lentils are primarily distributed as materials for food processing, yet some are commercially distributed as dry beans.

- Since dry pulses require soaking before cooking, younger generations that value effortlessness in cooking have turned away from dry pulses. Demand for dry pulses is underpinned by the middle-aged and seniors (above 60). To increase consumption among younger generations, semi-cooked (boiled) beans and ready-to-eat meals that just require heating are being marketed.

POSITIONING OF DOMESTIC PRODUCTS AND IMPORTED PRODUCTS

《Transition of Price of Major Pulses》



		2018	2019	2020	2021	2022	2023	CAGR
Adzuki beans	Japanese	3.1	4.5	4.0	2.9	3.1	3.4	1.6%
	Canadian	2.0	2.7	2.1	2.0	2.4	2.4	3.5%
	Chinese	1.5	1.8	1.7	2.0	2.4	2.3	8.7%
Kidney beans	Ootebo (Japanese)	2.7	3.3	0.0	3.8	3.8	3.8	6.7%
	Baby lima (American)	1.3	1.1	0.8	0.9	1.7	2.1	10.6%
	Butter bean（Burmese)	0.9	0.9	0.6	0.6	1.0	1.2	6.1%

(Created by Yano Research Institute, based on Trade Statistics of Japan)

***Based on volumes at primary wholesaler**

***Price uncertainty increased for Ootebo (white beans) in 2020 as it became scarce from May 2019**

- For adzuki beans, domestic produce is the highest in quality and price. While Canadian beans were more expensive than Chinese beans until 2019, a rise in Chinese bean prices and a decline in demand for imports due to a preference for domestic products have eliminated the price difference between Chinese and Canadian beans. Still, Canadian beans are often considered superior to Chinese beans because Japanese consumer tend to (question Chinese product quality, thus) avoid purchasing Chinese products.

- As per kidney beans, Japanese Ootebo is the most expensive, and its price has been remaining high in the last few years due to abnormal weather conditions that deteriorated the crop yield. Among imports, baby lima from the U.S. and butter beans from Myanmar are widely used for white sweet bean paste. Although the price of imports dropped in 2020-2021 due to slowdown in the gift demand due to the pandemic, it is increasing from 2022. Price hike of Burmese butter beans attributes to the Myanmar’s political instability and the rising food demand in China. The price of American baby lima rose due to the abnormal weather conditions that deteriorated crop yields as well as the weak yen.

CHARACTERISTICS OF MAJOR PRODUCTS & TOP-SELLING PRODUCTS

Wagashi（using "adzuki an", the sweetened adzuki paste）

Manufacturing retailer	Dorayaki	Yokan	Anpan
			
Brand	Bunmeido	Toraya Confectionery	Little Mermaid
Price	$1.5 USD (with tax)	$2.1 USD (with tax)	$1.5 USD (with tax)
Sales channel	Company-operated shop, department store, EC	Company-operated shop, department store, EC	Bakery
Usage*	Gift & everyday sweets	Gift	Everyday sweets

(*Refers to the customer's purpose behind a purchase)

Wide distributor	Dorayaki	Small Yokan (package quantity: 4)	Small-size Anpan (package quantity: 4)
			
Brand	7-Eleven PB	Imuraya	Yamazaki Baking
Price	$1.1 USD (with tax)	$2.3 USD (with tax)	Open priced (around $0.99 USD with tax)
Sales channel	Supermarket, convenience store	Supermarket, convenience store	Supermarket, convenience store
Usage*	Everyday sweets	Everyday sweets	Everyday sweets

(Source of product images: brand company's websites)

- Luxury confectionery brands primarily use domestically-produced adzuki beans. The brands appeal the value by indicating "using adzuki beans produced in Hokkaido" on the package. Except for some brands, everyday sweets use imported adzuki beans to keep their prices down.

- There are two types of adzuki paste; a chunky type that partially contains whole adzuki beans, and a smoother type made by thoroughly straining beans.

Wagashi（using "shiroan", the sweetened bean paste made with white kidney beans)

	Nerikiri	Kuri Manju (chestnut cake)	Milk Manju
			
Brand	Tsuruya Yoshinobu	Kogetsudo	Meigetsudo
Price	From $3.2 USD (with tax)	$1.1 USD (with tax)	$1.0 USD (with tax)
Sales channel	Company-operated shop, department store	Company-operated shop, department store, EC	Company-operated shop, train station, airport
Usage	Tea Ceremony	Gift	Tourist souvenir

(Source of product images: brand company's websites)

- Domestically-produced Ootebo and white adzuki beans (*shiro shozu*) are more expensive than imported beans, and therefore mainly used in luxury wagashi.
- Use of imported butter beans and baby lima range widely from luxury wagashi to widely-distributed wagashi. Since the pastes made with these are whiter than those made with domestically-produced Ootebo and white adzuki beans, they are suited for adding colorants.

Simmered beans, boiled beans

	Simmered beans (red kidney beans)	Simmered beans (white flower beans)	Boiled mix beans (garbanzo, marrowfat peas, red kidney beans)
			
Manufacturer	Fujicco	Fujicco	Kewpie
Price	$1.4 USD (with tax)	$1.4 USD (with tax)	$1.0 USD (with tax)
Sales channel	Supermarket	Supermarket	Supermarket

(Source of product images: brand company's websites)

- Simmered and sweetened beans had been traditional food in Japan. However, the Westernization of food culture decreased the people consuming pulses, particularly in younger generations.

- Manufacturers known for simmered beans include Fujicco, Maruyanagi Foods, and Kikuchi Foods Industry. Kewpie, known for salad dressings, has launched a mix of boiled garbanzo, marrowfat peas, and red kidney beans as one of its salad-topping brands “Salad Club.” The ready-to-eat pack offers a convenient option for customers to add to their salads.

Chickpeas, Lentils

	Boiled beans (garbanzo)	Boiled beans (lentils and chickpeas)	Hummus
			
Manufacturer	Kewpie	Kewpie	KURAKON FOODS
Price	$1.1 USD (with tax)	$1.1 USD (with tax)	$2.1 USD (with tax)
Sales channel	Supermarket	Supermarket	Supermarket

(Source of product images: brand company’s websites)

- Kewpie’s “Salad Club” series has both a single boiled bean pack (e.g., chickpeas) and a mixed boiled beans pack (e.g., lentils and chickpeas). Although chickpeas and lentils are still unfamiliar in Japan, Kewpie released the products in February 2023 as they were inspired by the fact that these beans are rich in protein, fiber, and iron, and are extensively used in soups and curry recipes around the world.

- Hummus is not familiar in Japan, neither as a product or as a recipe. However, it is becoming popular gradually, as it has become available not only in international food stores but also at general supermarkets.

Major Importers

Company Name	Address	URL
AIWA CO.,LTD.	2-21 Sumiike-cho, Nakagawa-ku, Nagoya, Aichi	https://mameaiwa.studio.site/
IZUX CO.,LTD.	3-1-1 Kami-Osaki, Shinagawa-ku, Tokyo	https://www.izux.co.jp/
IWAKI SHOTEN	2-30 Higashiokisu, Tokushima City, Tokushima	https://www.iwaki-beans.com/
VOX TRADING CO.,LTD.	2-7-1 Hatchobori, Chuo-ku, Tokyo	http://www.voxtrading.jp/jp
CARGILL JAPAN LLC	3-1-1 Marunouchi, Chiyoda-ku, Tokyo	https://www.cargill.co.jp/
HUATONG UNION	93 Edomachi, Chuo-ku, Kobe-shi, Hyogo	-
KANEZEN CO.,LTD.	1-1-26 Ohimazato-minami, Higashinari-ku, Osaka-shi, Osaka	https://www.kanezen.com/
KANEMATSU CORPORATION	2-7-2 Marunouchi, Chiyoda-ku, Tokyo	https://www.kanematsu.co.jp/
KANEMARU	38 Kita-Memuro Kita 4-sen, Memuro-cho, Kasai-gun, Hokkaido	https://tokachi-kanemaru-mame.co.jp/
KAMIYA SHOTEN	3-14 Tsukiji-cho, Hyogo-ku, Kobe-shi, Hyogo	-
KAWASHO FOODS CORPORATION	2-2-1 Otemachi, Chiyoda-ku, Tokyo	https://www.kawasho-foods.co.jp/
KUSHIDA	1-7-9 Meieki Minami, Nakamura-ku, Nagoya-shi, Aichi	-
KOMEI TRADING CO., LTD.	3-11-8 Motomachi-dori, Chuo-ku, Kobe-shi, Hyogo	https://komei.cangofu.com/top_page2
KOWA SHOJI	1-4-5 Hatchobori, Chuo-ku, Tokyo	-
GOMEI SHOJI KAISHA LTD.	1-11-6 Hatchobori, Chuo-ku, Tokyo	https://www.gomei-shoji.co.jp/
SAWADA SHOTEN	3-2-4 Nishitenma, Kita-ku, Osaka-shi, Osaka	https://n5vmxvw9d.jbplt.jp/
SANKO SHOKUHIN	2-16-7, Nihonbashi-Kaigaracho, Chuo-ku, Tokyo	https://sankou-s.co.jp/
THE SANSIAO TRADING CO., LTD	3-2-9 Nihonbashi, Chuo-ku, Tokyo	http://www.sansiao.co.jp/
SANCHU CO.,LTD.	1-2-7 Etchujima, Koto-ku, Tokyo	http://www.sanchu.co.jp/
J-NIKKA PARTNERS,INC.	8-1 Akashi-machi, Chuo-ku, Tokyo	https://j-nikka.com/
SHINOMIYA & CO., LTD.	3-1-11 Nagasawa-cho, Hyogo-ku, Kobe-shi, Hyogo	http://shinomiyabean.jp/
SHINKO JITSUGYO CO.LTD.	4-1-15 Onogaradori, Chuo-ku, Kobe-shi, Hyogo	http://www.s-tr.com/
SHINSEI BUSSAN	1-4-23 Honmachi, Hyogo-ku, Kobe-shi, Hyogo	https://www.shinsei-bussan.com/
SUGIHARA INDUSTRIAL CO.,LTD	6-7, Koyo-cho Nishi, Higashinada-ku, Kobe-shi, Hyogo	https://www.sic-kobe.jp/
SUGIYAMA SHOJI CO.,LTD.	13-3 Koamicho, Nihonbashi, Chuo-ku, Tokyo	https://sugiyama1904.co.jp/ja/
SUZUKI BEANS HOKKAIDO, CO LTD.	85-63 Higashimae, Hokuto-shi, Hokkaido	https://www.suzukibeans.co.jp/
SC FOODS CO., LTD.	1-2-2 Hitotsubashi, Chiyoda-ku, Tokyo	https://www.scfoods.co.jp/
SOJITZ FOODS CORPORATION	3-1-1 Roppongi, Minato-ku, Tokyo	https://www.sojitz-foods.com/
DAIEI SANGYO KAISHA, LTD.	4-18 Honjin-dori, Nakamura-ku, Nagoya-shi, Aichi	https://www.daiei-sangyo.co.jp/
TAISHIN COMPANY, LTD.	1-6-12 Kyobashi, Chuo-ku, Tokyo	https://www.taishin.gr.jp/
DAIWA GRAIN	1-3-9, Nishi 23jo Kita, Obihiro-shi, Hokkaido	https://daiwa-grain.co.jp/
ESU-ERU KANZAI	2-6-6 Nihonbashi Horidome-cho, Chuo-ku, Tokyo	-
TOKAI DENPUN CO.,LTD.	24-15 Denmacho, Aoi-ku, Shizuoka City, Shizuoka	http://www.tdc-net.co.jp/
MITSUI & CO. AGRI FOODS, LTD.	2-4-1 Shiba-Koen, Minato-ku, Tokyo	https://www.mitsui-agrifoods.com/
TOWA BUSSAN	3-10-1 Iwamoto-cho, Chiyoda-ku, Tokyo	-
TOYOTA TSUSHO FOODS CORPORATION	2-3-13 Konan, Minato-ku, Tokyo	https://www.toyotsu-shokuryo.com/
NAGASAKI SHOJI	249-22, Kyowa Higashi 2-Sen, Nakasatsunai-mura, Kawanishi-gun, Hokkaido	https://www.nagasakishouji.com/
NAMIKI SHOJI	1-9 Miyagawa-cho, Naka-ku, Yokohama-shi, Kanagawa	-
NISSHO BUSSAN	2-9-5 Nihonbashi, Chuo-ku, Tokyo	-

(list continued to next page)

Company Name	Address	URL
NIPPON STEEL TRADING CORPORATION.	2-7-1 Nihonbashi, Chuo-ku, Tokyo	https://www.nst.nipponsteel.com/
NOMURA TRADING CO., LTD.	1-7-3 Azuchi-machi, Chuo-ku, Osaka-shi, Osaka	https://www.nomuratrading.co.jp/
HAGIWARA KEIZOU CO.,LTD.	1-1-13 Nishi 23-jo Kita, Obihiro City, Hokkaido	https://www.hagi-kei.co.jp/
HASEBE CORPORATION	1-774 Shinko-Nishi, Ishikari City, Hokkaido	https://e-mameya.com/
KUNO SHOKAI	1-3, Hamacho, Moji-ku, Kitakyushu-shi, Fukuoka	http://www.hisano-s.com/index.html
FUJII CORPORATION.	4-31-1, Ryutsu Danchi 2jo, Asahikawa-shi, Hokkaido	http://www.beans-rice.co.jp/
FUNATO ZAKKOKU	4-4, Nishi 1-jo Kita, Nakasatsunai-mura, Kawanishi-gun, Hokkaido	-
HEIWA NOUSAN	1-1-8 Sakae-machi-dori, Chuo-ku, Kobe-shi, Hyogo	-
HOUWA SHOJI	1-5-2 Hatchobori, Chuo-ku, Tokyo	-
HOSAKA SHOTEN	3-9-9 Tonyamachi, Takasaki City, Gunma	-
MASUDA SHOTEN	2-1-26 Shimakami-cho, Hyogo-ku, Kobe-shi, Hyogo	-
MARUICHI CORPORATION	1-10-14 Nihonbashi Horidome-cho, Chuo-ku, Tokyo	https://www.mupj.co.jp/
MARUKA SHOTEN	3-7-6 Sannomiya-cho, Chuo-ku, Kobe-shi, Hyogo	-
MARUKATSU CO., LTD.	1-1 Nishi 25 Minami, Obihiro-shi, Hokkaido	https://www.marukatsu.info/
MARUBENI CORPORATION	1-4-2 Otemachi, Chiyoda-ku, Tokyo	https://www.marubeni.com/jp/
MARUWA SHOKUSAN	1-2-48, Miyamadai, Tarumi-ku, Kobe-shi, Hyogo	-
MIZUNO YOJURO CO., LTD.	23 Fukatsubo, Shirahama-cho, Tsushima City, Aichi	https://since1920.co.jp/
MORITA CO.,LTD	2-21 Soen-cho, Nakagawa-ku, Nagoya-shi, Aichi	http://mame-mochi-morita.com/
MORIMITU SHOTEN	5-30 Jonan-cho, Kurume-shi, Fukuoka	https://kokumotsuya.com/
YAMAMATSU MATUDA SHOTEN	262-2 Shimizugawa, Hokuto-shi, Hokkaido	http://matsudasyouten.com/
YAMAMOTO TADANOBU SHOTEN	7-3, Kino Nishidori, Ondo-cho, Kawato-gun, Hokkaido	https://www.yamachu-tokachi.co.jp/
YOSIDAGO	1-11-6 Hatchobori, Chuo-ku, Tokyo	http://yoshidago.co.jp/index.html
WAKO SHOKURYO	6-3-2 Toyo, Koto-ku, Tokyo	-
BIZWIN CONSULTING INC.	6-34-9 Shimouma, Setagaya-ku, Tokyo	http://bizwin.co.jp/
TOMASU	1-9-4 Shibuya, Shibuya-ku, Tokyo	-
AMAKASU TRADING	6-6-3 Roppongi, Minato-ku, Tokyo	-
AGRISYSTEM CO,	15-8, Higashi-Memuro Kisen, Meimuro-cho, Kasai-gun, Hokkaido	https://agrisystem.co.jp/
TK CONSULTING	2-3-4 Hiehara-cho, Nada-ku, Kobe-shi, Hyogo	-
KATAOKA SHOTEN	92, Sarabetsu Minami 2-sen, Sarabetsu-mura, Kasai-gun, Hokkaido	https://factory.komekoubou-kataoka.com/
HOKKAIDO GRAIN COMPANY	231-8, Aza Inami, Bihoro Cho, Abashiri-gun, Hokkaido	https://www.hgrain-okhotsk.com/
JOVIAL	3-2-1-709 Nakayamate-dori, Chuo-ku, Kobe-shi, Hyogo	-
A.S. CONSULT	100 Edomachi, Chuo-ku, Kobe-shi, Hyogo	-

- Corporations or individuals intending to receive tariff quota for importing pulses to Japan must meet the conditions set by the Ministry of Agriculture, Forestry and Fisheries (MAFF), and apply to MAFF for obtaining a tariff quota certificate.
- A list of names and addresses of corporations or individuals with the tariff rate quota certificate is available on the MAFF website. Listed above are the importers certified (for certificate of general quota; in FY2023, 71 importers obtained the certificate).

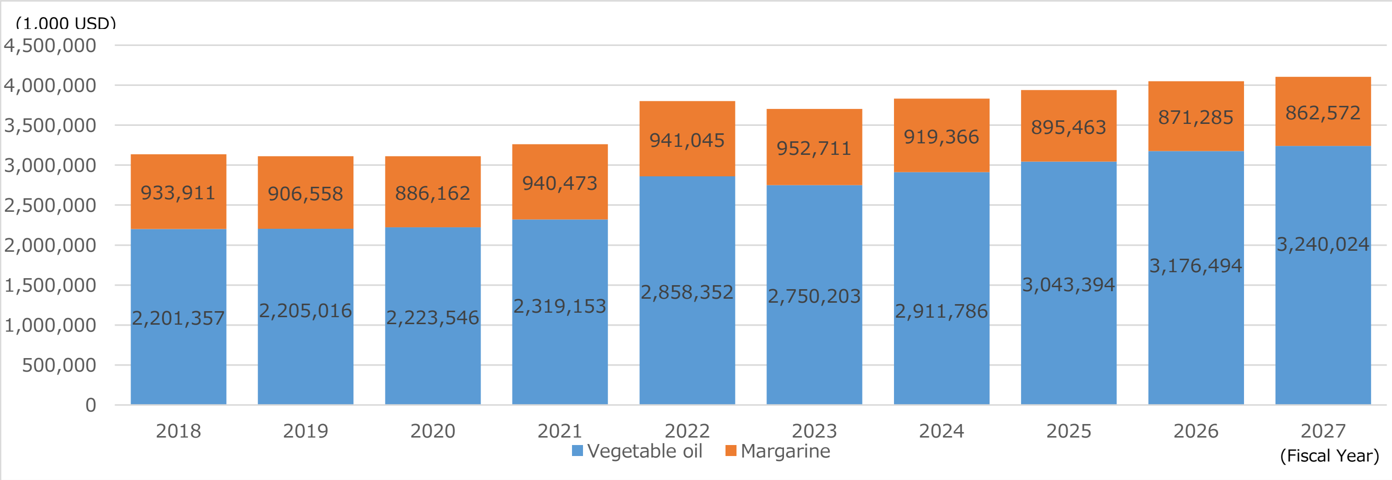
7. Vegetable Oil, Margarine

Key points of the market trend and characteristics

- **By value, the market size of vegetable oil and margarine is expanding along with inflation. Specifically, the vegetable oil market is robust, driven by consistent demand for versatile products and as well as a rising demand for premium products. In contrast, while there is stable demand for margarine used in commercial applications, demand is declining for household applications.**
- **Edible oils and fats distributed in Japan can be categorized by application, i.e., for food production (to be processed by food manufacturer) and for food services (for restaurants, for delis making ready-to-eat dishes, etc.), and for household use that are sold at supermarkets. Around 50 percent of the total distribution volume goes to food processing, 30 percent to food services, and 20 percent to households.**
- **The majority of vegetable oils available in Japan are provided by domestic brands. These brands import raw material and bulk fats, extract and strain oil, and package the processed oil in containers labeled with their brand. Overseas brands are imported by trading companies or parallel importers and are sold through mail order or retail outlets.**
- **The import of vegetable oil and margarine to Japan is experiencing a slight decline in volume, but the value is increasing due to inflation. This trend is influenced by rising logistics costs and energy prices, as well as poor harvests of oil-producing crops. Additionally, geopolitical factors like the Russian invasion of Ukraine and the growing demand for biofuels driven by global decarbonization efforts are also impacting prices.**
- **Imported products like olive oil, grapeseed oil, and linseed oil are typically high-quality options that appeal to health-conscious consumers. These oils come in various price ranges and are commonly found in upscale grocery stores. While more affordable oils are primarily used for cooking, these premium oils are often enjoyed raw.**

Market Size

MARKET SIZE TRANSITION (BY VALUE, FY2018 TO FY2027)



(Unit: 1,000 USD)		2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	CAGR 2018-2027
Vegetable oil & Margarine		3,135,268	3,111,574	3,109,707	3,259,626	3,799,397	3,702,914	3,831,152	3,938,857	4,047,779	4,102,596	3.0%
	Year-on-Year	10,410.7	99.2	99.9	104.8	116.6	97.5	103.5	102.8	102.8	101.4	
Vegetable oil		2,201,357	2,205,016	2,223,546	2,319,153	2,858,352	2,750,203	2,911,786	3,043,394	3,176,494	3,240,024	4.4%
	Year-on-Year	10,593.9	100.2	100.8	104.3	123.2	96.2	105.9	104.5	104.4	102.0	
Margarine		933,911	906,558	886,162	940,473	941,045	952,711	919,366	895,463	871,285	862,572	-0.9%
	Year-on-Year	10,003.2	97.1	97.8	106.1	100.1	101.2	96.5	97.4	97.3	99.0	

*Margarine includes fat spreads and shortenings.
*The figure for FY2023 is a projection. The figures for FY2024 and beyond are the forecasts.
(Estimated by Yano Research Institute)

- The market size of vegetable oil and margarine in FY2023 was $3,702,914 thousand USD (down by 2.4% from the previous year). The market size was forecasted to grow at a CAGR of 3.0% over the nine-year period from FY2018 to FY2027, to reach $4,102,596 thousand USD by FY2027.
- While the market experienced a slowdown in growth for FY2023, following a sharp recovery in the previous year as a rebound from the pandemic, the medium-term outlook remains positive. Japan relies heavily on imports for most of the raw materials required for vegetable oil production, with the exception of rice bran oil. The growth in market size is driven by rising product prices, which are a result of escalating costs for key raw materials.
- Conversely, the margarine market is experiencing a decline, with a CAGR of -0.9% projected over the nine-year period from FY2018 to FY2027. Production volumes are decreasing due to intensifying competition driven by a wider range of bread accompaniments at home, such as jams and olive oil, along with rising raw material costs and the negative perception of trans fatty acids.
- Going forward, the vegetable oil market is expected to stay strong, while the margarine market is likely to decline. With the growing interest in the nutritional benefits of vegetable oils, demand for premium products is anticipated to increase.

TRANSITION OF TOTAL IMPORT SIZE PER COUNTRY（HS CODE-BASED, FY2018 TO FY2023, VALUE & VOLUME）

《Import value transition》

FY2023 Ranking	Unit: (1,000 USD) Country name	Fiscal Year 2018	2019	2020	2021	2022	2023	CAGR 2018-2023
1	Brazil	11,553	12,141	12,870	20,322	18,993	29,690	20.8%
2	India	25,715	21,464	23,915	26,251	40,468	26,894	0.9%
3	Thailand	9,051	7,147	5,232	14,400	36,283	23,913	21.4%
4	France	8,423	9,305	8,951	11,153	4,607	20,463	19.4%
5	United States	23,349	21,147	18,086	19,979	21,149	18,779	-4.3%
6	China	16,363	16,141	14,688	17,827	19,427	16,622	0.3%
7	Italy	16,298	12,663	12,765	12,662	16,586	16,242	-0.1%
8	Spain	8,080	7,648	6,139	8,893	15,192	13,743	11.2%
9	Malaysia	4,478	5,558	4,963	4,328	7,058	12,061	21.9%
10	Belgium	3,981	4,472	4,486	8,510	10,634	11,850	24.4%
11	Vietnam	5,695	5,485	5,131	5,984	12,120	11,515	15.1%
12	Mexico	2,061	3,482	7,661	4,917	5,884	9,477	35.7%
13	Türkiye	1,723	1,919	2,068	4,363	3,162	5,863	27.8%
14	Singapore	3,198	3,166	3,018	3,820	4,405	4,569	7.4%
15	Germany	3,224	3,338	2,269	5,545	8,082	4,062	4.7%
16	Panama	2,915	2,700	2,153	3,122	3,374	3,415	3.2%
17	Hungary	4,460	5,435	1,688	2,418	6,321	3,384	-5.4%
18	Denmark	406	772	1,148	1,401	2,144	3,029	49.5%
19	Argentina	6,809	2,893	5,141	1,973	4,554	2,527	-18.0%
20	Canada	2,363	2,093	1,771	1,610	2,609	2,482	1.0%
	Other	17,928	17,890	19,777	25,025	26,868	17,591	-0.4%
	Total	178,075	166,860	163,921	204,505	269,919	258,169	7.7%
	Year-on-Year（%）	106.5	93.7	98.2	124.8	132.0	95.6	

*Cumulative total, from January to December

*Concentration ratio of top 10 countries: 73.7%（2023）

*Import from Türkiye: 5,863 thousand USD , share 2.3%, ranked 13th（2023）

- By value, the most common import from Brazil and India were rice bran oil and castor oil, respectively. The most common import from Türkiye was sunflower oil.
- Growth was observed for many importing countries. Overall, the import volume exhibited a CAGR of 7.7% over the nine-year period from FY2018 to FY2027.

《Import volume transition》

FY2023 Ranking	Unit: (ton) Country name	Fiscal Year 2018	2019	2020	2021	2022	2023	CAGR 2018-2023
1	Brazil	17,802	19,324	21,125	25,134	13,920	22,600	4.9%
2	India	20,458	17,727	18,121	19,447	20,903	16,542	-4.2%
3	Thailand	13,131	10,366	6,128	13,408	23,089	14,743	2.3%
4	France	8,444	9,053	8,792	8,348	1,068	8,766	0.8%
5	Belgium	3,832	4,361	3,950	5,109	4,460	5,531	7.6%
6	Spain	6,041	6,293	5,072	5,649	6,264	5,478	-1.9%
7	Malaysia	3,831	4,081	3,728	3,306	3,413	5,166	6.2%
8	Vietnam	4,353	4,060	4,062	3,469	4,729	4,902	2.4%
9	Türkiye	2,042	2,498	2,456	3,213	1,867	4,035	14.6%
10	Italy	5,672	5,445	4,417	3,919	4,286	3,907	-7.2%
11	United States	9,365	8,507	7,455	4,841	4,205	2,958	-20.6%
12	Mexico	649	1,329	4,549	2,244	1,443	2,736	33.4%
13	China	3,727	3,693	3,186	2,677	2,632	2,674	-6.4%
14	Hungary	5,570	6,740	2,061	2,415	2,815	2,017	-18.4%
15	Singapore	2,199	2,340	2,038	2,062	1,759	1,902	-2.9%
16	Germany	2,785	2,775	1,389	2,672	2,981	1,663	-9.8%
17	Denmark	150	278	462	579	772	922	43.8%
18	The Netherlands	810	1,110	685	878	734	562	-7.1%
19	Indonesia	1,240	1,057	908	540	485	484	-17.1%
20	Argentina	6,477	1,561	4,998	357	1,598	481	-40.6%
	Other	5,193	6,839	10,865	11,919	8,664	3,135	-9.6%
	Total	123,770	119,436	116,447	122,186	112,086	111,206	-2.1%
	Year-on-Year (%)	110.0	96.5	97.5	104.9	91.7	99.2	

*Cumulative total, from January to December

*Concentration ratio of top 10 countries : 82.4% (2023)

*Import volume from Türkiye: 4,035 tons, share 3.6%, ranked ninth (2023)

《Unit price transition》

	Fiscal Year 2018	2019	2020	2021	2022	2023	CAGR 2018-2023
Unit price (US$/kg)	1.44	1.40	1.41	1.67	2.41	2.32	10.0%
Year-on-Year (%)	96.9	97.1	100.8	118.9	143.9	96.4	

- Despite positive growth by import value, exhibiting a CAGR of 7.5% over the five-year period from FY2018 to FY2023, a CAGR by volume was -2.1% on the same basis. The unit price showed a CAGR of 10.0% over the same period.
- In addition to the soaring logistics costs and energy prices, poor harvests of oil-producing crops, geopolitical factors like the Russian invasion of Ukraine, and the growing demand for biofuels driven by global decarbonization efforts are increasing the unit prices.

Key Information for Exporting to Japan

TARIFFS (HS CODE-BASED)

*General or Temporary rate shall be applied unless a specific tariff rate is shown in the tables below.

Statistical code		Description	Tariff rate						
H.S. code			Türkiye	General	Temporary	ASEAN	CPTPP	EU	US
15.12		Sunflower-seed, safflower or cotton-seed oil and fractions thereof, whether or not refined, but not chemically modified							
		Sunflower-seed or safflower oil and fractions thereof :							
1512.11		Crude oil							
		1 Of an acid value exceeding 0.6		17 yen/kg					
	110	- Sunflower-seed oil	8.50 yen/kg				Free	Free	Free
	210	- Safflower oil	8.50 yen/kg				Free	Free	Free
		2 Other		20.70 yen/kg					
	120	- Sunflower-seed oil	10.40 yen/kg				Free	Free	Free
	220	- Safflower oil	10.40 yen/kg				Free	Free	Free
1512.19		Other		20.70 yen/kg					
	010	- Sunflower-seed oil and its fractions	10.40 yen/kg				Free	Free	
	090	- Safflower oil and its fractions	10.40 yen/kg				Free	Free	
		Cotton-seed oil and its fractions :							
1512.21		Crude oil, whether or not gossypol has been removed		17 yen/kg					
	010	- Used for the manufacture of canned fish or shellfish for export	Exemption			Free	Free	Free	
	090	- Other	8.50 yen/kg				Free	Free	Free
1512.29		Other		17 yen/kg					
	010	- Used for the manufacture of canned fish or shellfish for export	Exemption			Free	Free	Free	
	090	- Other	8.50 yen/kg				1.89 yen/kg	1.89 yen/kg	1.89 yen/kg
15.15		Other fixed vegetable or microbial fats and oils (including jojoba oil) and their fractions, whether or not refined, but not chemically modified							
		Linseed oil and its fractions :							

Statistical code		Description	Tariff rate						
H.S. code			Türkiye	General	Temporary	ASEAN	CPTPP	EU	US
1515.11	000	Crude oil	5% or 5.50 yen/kg, whichever is the greater	10% or 11 yen/kg, whichever is the greater			Free	Free	Free
1515.19	000	Other	5% or 5.50 yen/kg, whichever is the greater	10% or 11 yen/kg, whichever is the greater			Free	Free	
		Maize (corn) oil and its fractions :							
1515.21		Crude oil							
	100	1 Of an acid value exceeding 0.6	5 yen/kg	10 yen/kg			1.82 yen/kg	1.82 yen/kg	
	200	2 Other	10.40 yen/kg	20.70 yen/kg			3.78 yen/kg	3.78 yen/kg	
1515.29	000	Other	10.40 yen/kg	20.70 yen/kg			3.78 yen/kg	3.78 yen/kg	
1515.30	000	Castor oil and its fractions	Free	7%		Free	Free	Free	Free
1515.50		Sesame oil and its fractions							
	100	1 Of an acid value exceeding 0.6	8.50 yen/kg	17 yen/kg			Free	Free	
	200	2 Other	10.40 yen/kg	20.70 yen/kg			1.30 yen/kg	1.30 yen/kg	
1515.60		Microbial fats and oils and their fractions							
	100	1 Of an acid value exceeding 0.6	8.50 yen/kg	17 yen/kg			Free	Free	Free
	200	2 Other	10.40 yen/kg	20.70 yen/kg			Free	Free	Free
1515.90		Other							
		1 Oiticica oil and its fractions, tung oil and its fractions		Free					
	110	- Tung oil and its fractions	Free			Free	Free	Free	
	190	- Other	Free			Free	Free	Free	
		2 Camellia oil, Urushi wax and Haze wax and their fractions		5%					
	200	- Camellia oil and its fractions	Free			Free	Free	Free	
	300	- Urushi wax and Haze wax and their fractions	4%			Free	Free	Free	
	600	3 Jojoba oil and its fractions	Free	7.5%		Free	Free	Free	
		4 Other							
		(1) Of an acid value exceeding 0.6		17 yen/kg					
	410	- Rice bran oil and its fractions	4.20 yen/kg			4.2 yen/kg	3.09 yen/kg	3.09 yen/kg	3.09 yen/kg

Statistical code		Description	Tariff rate						
H.S. code			Türkiye	General	Temporary	ASEAN	CPTPP	EU	US
	510	- Other	8.50 yen/kg				Free	Free	Free
		(2) Other		20.70 yen/kg					
	420	- Rice bran oil and its fractions	10.40 yen/kg				3.78 yen/kg	3.78 yen/kg	3.78 yen/kg
	520	- Other	10.40 yen/kg				Free	Free	Free
15.17		Margarine; edible mixtures or preparations of animal, vegetable or microbial fats or oils or of fractions of different fats or oils of this Chapter, other than edible fats and oils or their fractions of heading 15.16							
1517.10	000	Margarine, excluding liquid margarine	29.8%	35%		29.8%	Free	Free	Free
1517.90		Other							
		1 Mixtures of animal fats and oils and their fractions, partly or wholly hydrogenated, inter-esterified, re-esterified or elaidinised, whether or not refined, but not further prepared, not otherwise prepared							
	110	(1) Partly or wholly hydrogenated, inter-esterified, re-esterified or elaidinised	Free	4%		Free	Free	Free	Free
	190	(2) Other	6.4%	7.5%		Free	Free	Free	
		2 Mixtures of vegetable or microbial fats and oils and their fractions, partly or wholly hydrogenated, inter-esterified, re-esterified or elaidinised, whether or not refined, but not further prepared, not otherwise prepared							
	210	(1)Partly or wholly hydrogenated, inter-esterified, re-esterified or elaidinised	Free	4%		Free	Free	Free	Free
	290	(2) Other	13.20 yen/kg	20.70 yen/kg		13.20 yen/kg	4.80 yen/kg	4.80 yen/kg	4.80 yen/kg
	300	3 Oils of a kind used as mould release	2.9%	4.8%		Free	Free	Free	Free
	400	4 Shortening	12.8%	15%		12.8%	Free	Free	
	900	5 Other	21.3%	25%		21.3%	Free	Free	Free

RELATED LEGAL SYSTEMS, REGULATIONS

Food Sanitation Act
(https://www.mhlw.go.jp/stf/seisakunitsuite/bunya/0000144562.html)

Main items	Regulatory authority	Regulations when importing
Food (confectionery, beverages, etc.) water, food additives, supplements, etc.	Ministry of Health, Labour and Welfare (MHLW)	Notification must be made to MHLW

《Outline》

- **The Food Sanitation Act aims to prevent sanitation hazards resulting from eating and drinking and to ensure food safety thereby protecting citizens' health. The Act also applies to imported foods.**
- **A person who intends to import food, etc. for the purpose of sale or to use in business is obliged to make an import notification from this perspective to ensure food safety, based on Article 27 of the Food Sanitation Act.**
- **Notifications are accepted at the quarantine station, where a food sanitation inspector examines the foods and products to confirm their compliance with the criteria and standards of the Food Sanitation Act, and the necessity of an inspection. (A consultation service is available.)**

《Notification procedures》

(1) Preparing for documents needed for the notification:
- ◆ Notification Form for Importation of Foods, etc.
- ◆ Other documents
  - · Description of raw materials and manufacturing processes (processed foods, etc., as required)
  - · Health (sanitary) certificate (as required)
  - · Test results (as required)

(2) Submit the completed Notification Form and other documentation to the quarantine station responsible for the port of import.

(3) The notification form and other documentation submitted are examined by a food sanitation inspector based on legislation to determine the necessity of inspections.

(4) When the document examination and cargo inspection have found that the cargo conforms to the act (the cargo "passed" the inspection), a "Certificate of Notification" will be returned to the importer from the MHLW quarantine station where the notification was first submitted.

《Recent amendments to Food Sanitation Act》

- To secure food safety against changes in environment surrounding food and food internationalization, the Food Sanitation Act has been amended in 2019 as follows:

(1) Reinforcement of wide-area food poisoning incident response

(2) Institutionalization of sanitation control in compliance with HACCP

(3) Obligation to notify health damage incident caused by intake of their food products containing the designated ingredients or components

(4) Introducing a positive list system for food containers and packaging
Reference of lists:
https://www.mhlw.go.jp/content/11130500/000638983.xlsm
https://www.mhlw.go.jp/content/11130500/000635356.xlsx

(5) Revision of licensing system and establishment of notification system for food business

(6) Obligation to notify food recall information to the government

(7) Further enhancement of import and export food safety certification:

For the purpose to confirm that the inspections and control have properly been conducted in the exporting countries for insurance of safety of imported foods, sanitation control based on HACCP and attachment of sanitation certificates of dairy products or aquatic food are required as a requisite of import.

《Other key points to notify》

- Food additives and pesticide residues are also restricted by the Food Sanitation Law. A positive list is provided here because multiple instances of non-compliance with Japanese food safety laws have been identified among imported food products.

Food additives

- Food additives such as preservatives, sweeteners, colorants, and flavoring agents used in the process of food production or for the purpose of food processing and preservation are also regulated under the Food Sanitation Act. MHLW allows the use of food additives only when they have been judged by the Food Safety Commission as not inflicting any risks on human health, and only after specifying standards for ingredients and criteria for their use. MHLW also strives to ensure the safety of food additives that have been approved for use by, for example, surveying the per capita intake of food additives. See below for the positive list of food additives.

Excel https://www.mhlw.go.jp/content/001031538.xlsx

Pesticide residue

- To ensure that pesticide remained in food not to inflict on human health, MHLW sets the residue standards for all agricultural chemicals, feed additives, and animal drugs. The residue standards are set by the Food Safety Commission for each food within the range of amount not harmful to intake. Any foods with agricultural chemicals, etc. remained at the level surpassing the standard are banned for sale or import by the Food Sanitation Act.
- To ensure that pesticide residues do not exceed standards, the Ministry of Agriculture, Forestry and Fisheries (MAFF) sets standards for use according to the Agricultural Chemicals Regulation Act in accordance with residue standards. In addition, when food products are imported, they are inspected for pesticide residues at the quarantine station.

For the search on pesticide residue standard values: https://db.ffcr.or.jp/front/

Food Labeling Act (https://www.caa.go.jp/en/policy/food_labeling/)

Main items	Regulatory authority	Measures to take
All food items sold for consumers, etc.	Consumer Affairs Agency	Labeling on container packages in Japanese language

《Labeling details》

- Following nine items are needed to be labeled for foods sold to consumers:

Items to label	Descriptions
1. General name	Indicate common name that expresses the process food contents.
2. Storage condition	Storage condition of the product before opening the package should be indicated in accordance with the characteristics of the food, such as "Store at room temperature out of direct sunlight," "Store at 10°C or below", etc.
3. Use by date or Best before date	Label "use by date" for foods that are quick to deteriorate in quality, while label "best before date" for all other foods.
4. Ingredients used	· Indicate the most common name of raw materials used, in descending order of percentage by weight. · For composite materials that comprise two or more of raw materials, list all materials in descending order of percentage by weight within the parentheses after the composite material name.
5. Additives	Indicate the name of substance for additives, in descending order of percentage by weight, except for those used for nutritious enhancement, processing aids, or those that can be applied to the "carry-over" principle.
6. Content or solid volume and total content	Indicate content weight, content volume, or content quantity. Content weight should be labeled in grams or kilograms, content volume in milliliters or liters, and content quantity in units such as number of pieces.
7. Amount and calorific value of nutrients	For consumer processed foods, calories, amount of protein, fat, carbohydrate, and sodium should be indicated.

8. Name and address of food business operator	Of food business operators, indicate the name and address of the person who is responsible for food labeling descriptions.
9. Location of manufacturing or processing plant and name of manufacturer or processor, etc.	Indicate the location of manufacturing or processing plant and the name of manufacturer or processer. For imported products, indicate the location of the importer's office and the name of the importer.

- In addition to the above, some items need to be indicated if certain requirements are met. The following two items need particular notice.

Items to indicate	Descriptions
Allergen	· Allergen labeling is mandatory for processed foods made from specified raw materials and foods containing additives derived from specified raw materials. · Allergen labeling is recommended for processed foods made from ingredients equivalent to specified raw materials. **Mandatory to label - Specific 8 ingredients:** Shrimp, crab, walnut, wheat, soba (buckwheat), eggs, milk, peanut **Recommended to label – 20 ingredients equivalent to specified raw materials:** Almond, abalone, squid, salmon roe, orange, cashew nut, kiwi fruit, beef, sesame, salmon, mackerel, soybean, chicken, banana, pork, macadamia nut, peach, yam, apples, gelatin
Country of origin	For imported products, name of the country of origin should be indicated.

(Source: "An Introduction of Rule in Japan "Food Labeling Guide" - Aiming for Food Safety and Reliability" by Food Labeling Certification Association, Consumer Affairs Agency)

Market Information

MARKET TRENDS IN RECENT YEARS

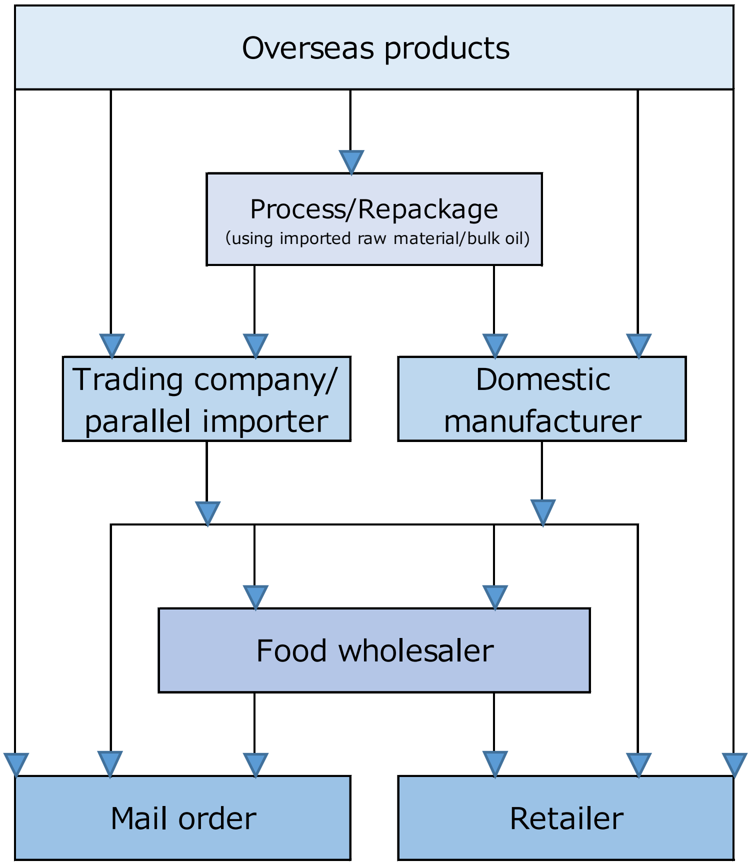
(Unit: 1,000 USD)	Fiscal Year 2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	CAGR 2018-2027
Vegetable oil & Margarine	3,135,268	3,111,574	3,109,707	3,259,626	3,799,397	3,702,914	3,831,152	3,938,857	4,047,779	4,102,596	3.0%
Year-on-Year	10,410.7	99.2	99.9	104.8	116.6	97.5	103.5	102.8	102.8	101.4	
Vegetable oil	2,201,357	2,205,016	2,223,546	2,319,153	2,858,352	2,750,203	2,911,786	3,043,394	3,176,494	3,240,024	4.4%
Year-on-Year	10,593.9	100.2	100.8	104.3	123.2	96.2	105.9	104.5	104.4	102.0	
Margarine	933,911	906,558	886,162	940,473	941,045	952,711	919,366	895,463	871,285	862,572	-0.9%
Year-on-Year	10,003.2	97.1	97.8	106.1	100.1	101.2	96.5	97.4	97.3	99.0	

*Margarine includes fat spreads and shortenings.
*The figure for FY2023 is a projection. The figures for FY2024 and beyond are the forecasts.
(Estimated by Yano Research Institute)

- Edible oils and fats distributed in Japan can be categorized by application, i.e., for food production (to be processed by food manufacturer) and for food services (for restaurants, for delis making ready-to-eat dishes, etc.), and for household use that are sold at supermarkets. Around 50 percent of the total distribution volume goes to food processing, 30 percent to food services, and 20 percent to households.

- A variety of edible and nonedible vegetable oils are used in Japan. The most commonly used oils are rapeseed oil, palm oil, and soybean oil.
- The vegetable oil market is experiencing growth driven by increasing unit prices due to inflation and the penetration of value-added products. There is a growing demand for edible oils in households, extending beyond traditional cooking oils like canola oil to include nutrient-rich oils intended for raw consumption, such as linseed oil, perilla oil, coconut oil, and rice bran oil. Products labeled as FOSHU (Food for Specified Health Uses) are seeing robust demand even at premium prices. The trend of consuming high-quality oils raw is emerging as a new culinary practice, reflecting a rising interest in the nutritional benefits of edible oils.
- In Japan, the demand for sesame oil has been strong, due to its flavor. The Covid crisis has further accelerated its penetration as more people cooked more at home and became more health-conscious. The use of sesame oil as a condiment to "sprinkle" or "toss" has gained popularity alongside its traditional use in heated cooking, prompting brand manufacturers to promote a diverse range of recipes actively.
- Margarines in Japan can be categorized into “margarine” that contains no less than 80% of oils and fats, and “fat spreads” that contains oils and fats less than 80%. Production volumes are decreasing due to intensifying competition driven by a wider range of bread accompaniments at home, such as jams and olive oil, along with rising raw material costs and the negative perception of trans fatty acids. The market is likely to shrink in the long term, even though it may expand in a short term associated with the supply and price of butter, which competes with margarine in some applications.
- Retail prices of vegetable oils and margarines intended for households are on the rise. The increase observed in the market is accompanied by a phenomenon known as shrinkflation, where companies reduce the size or quantity of a product while keeping the same price.
- In the medium to long term, the vegetable oil market is expected to grow slightly, while the margarine market is likely to decline minimally.

DISTRIBUTION, SALES CHANNEL



- Most of the vegetable oils sold in Japan are products of domestic brands. The brands import raw materials and bulk oils, extract oil, and repackage them in containers with their brand labels. Overseas brands are typically brought into Japan by trading companies or parallel importers and are available through mail order or retail stores.
- Imported margarines are used in commercial applications. The distribution volume for margarines aimed at general consumers is minimal.

POSITIONING OF DOMESTIC PRODUCTS AND IMPORTED PRODUCTS

- Because of the limited total import volume, there is no overseas brand that is acknowledged nationwide.
- The majority of imported oils are nutrient dense oils, such as olive oil, grapeseed oil, and linseed oil. These oils come in various price ranges and are commonly found in upscale grocery stores. While more affordable oils are primarily used for cooking, these premium oils are often enjoyed raw.

CHARACTERISTICS OF MAJOR PRODUCTS & TOP-SELLING PRODUCTS

- In response to Japan's declining household sizes, consumer products are mostly offered in many sizes.

- Many vegetable oils and margarines promote health benefits, highlighting features like "no cholesterol" or "FOSHU (Food for Specified Health Uses).
- With a major Japanese brand discontinuing its margarine production for home use, the margarine market is diminishing. While there is still robust demand for commercial applications, substantial growth cannot be expected.

《Major Products》

【Vegetable Oil】

Manufacturer	Product name	Content	Price（with tax）＊
Nissin Oillio Group	Nissin Salad Oil	1000g	$3.9 USD
Ingredients	Edible soybean oil (made in Japan), edible rapeseed oil		
Characteristics	A blend of rapeseed oil (great thermal stability) and soybean oil (rich in taste). Excellent choice for various cooking techniques, from deep fry to toss and marinate. Nissin's unique "Oxidation Block Method" reduces the oxidation of the oil by approximately 30%（before opening）.		
Product image (source: brand HP)			

*Retail price on ecommerce site (www.yodobashi.com, as of Sep 24, 2024)

Manufacturer	Product name	Content	Price（with tax）＊
Nissin Oillio Group	BOSCO Extra Virgin Olive Oil	456g	$11.8 USD
Ingredients	Edible olive oil (made in Italy)		
Characteristics	Domestic brand produced by repackaging imported bulk oil. Characterized by a fruity and rich flavor obtained from fresh olive fruit. Perfect for non-heating cooking, including last sprinkle on pasta, seafood, or as salad dressings. Deep green light-filtered bottle keeps freshness.		
Product image (source: brand HP)			

*Retail price on ecommerce site (www.yodobashi.com, as of Sep 24, 2024)

【Margarine】

Manufacturer	Product name	Product type	Liquid volume	Price (with tax) *
Meiji	Meiji Corn Soft	Fat spread	300g	$2.1 USD
Ingredients	Edible vegetable oil (made in Japan), edible purified processed oil, salt, whey powder (including dairy), emulsifier (derived from soybean), flavoring, coloring (beta-carotene)			
Characteristics	A light, yet rich bread accompaniment made mostly from corn oil, with a creamy deliciousness enhanced with milk. Latest version just launched in September 2024.			
Product image (source: brand HP)				

*Manufacturer's suggested retail price (MSRP)

MAJOR IMPORTERS

· Overseas products are rarely distributed.

Company name	Address	Business outline	URL
KANEDA Co., Ltd.	1-4-12 Nihonbashihoncho, Chuo-Ku, Tokyo	Wholesale of edible oils, medicine, cosmetics, chemicals, and other industrial materials	https://www.kaneda.co.jp/
SHOEI FOODS CORPORATION	5-7, Akihabara, Taito-ku, Tokyo	Importing and distributing raw dairy products, oils, fats, raw materials for confectionery production, canned foods, dried fruits, and nuts	https://www.shoeifoods.co.jp/
Ikeden K.K.	2-12-5 Shimbashi, Minato-ku, Tokyo	Sales of raw materials for confectionery production and confectionery packaging, and real estate	https://www.ikeden.com/
MITOKU CO., LTD	Hamarikyu Intercity 1-9-1 Kaigan Minato-ku Tokyo	Importing and distributing organic foods such as organic soybeans and grains as raw materials for food processing, certified organic foods; exporting Japanese foods	https://mitoku.co.jp/

8. Sugar Confectionery (Candy, Caramel, Chewing Gum)

Key points of the market trend and characteristics

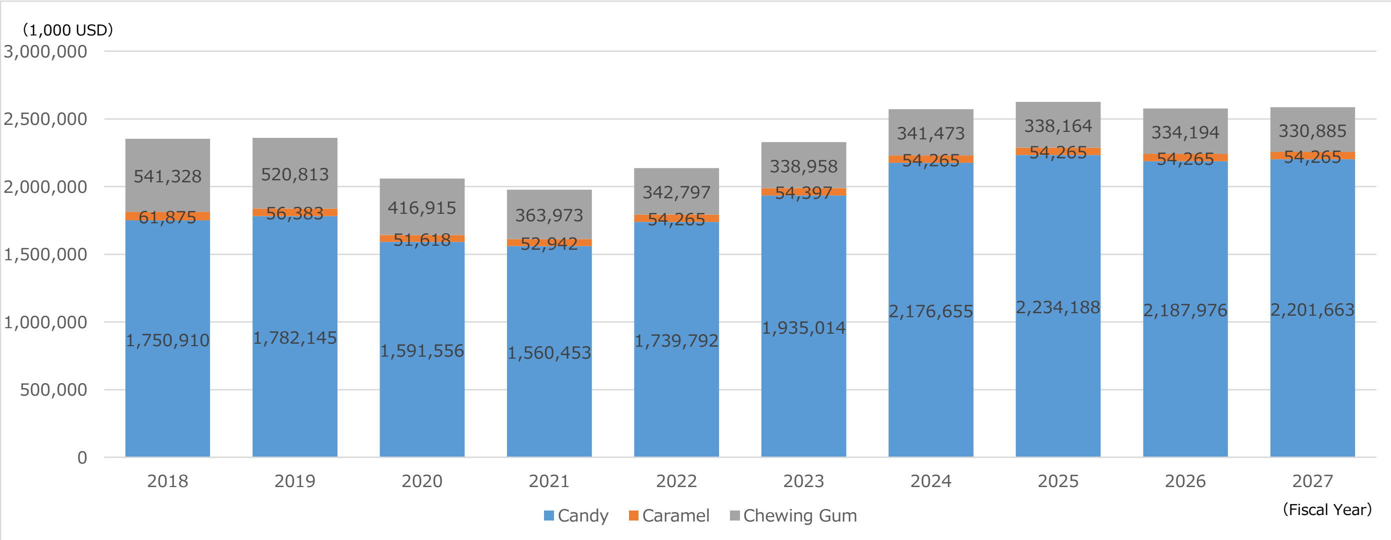
- **Gummy candies have become a popular segment within the sugar confectionery market (candies, caramels, and chewing gums). Both domestically produced gummies and imported brands like HARIBO have seen increasing demand, particularly among Generation Z, since around 2021. Japanese gummy brands focus on delivering rich flavors and unique textures, while imported gummy candies are gaining traction with their distinctive designs and shapes.**

- **The hard candy market declined during the pandemic, as these products are typically consumed on the go. However, driven by a heightened focus on self-care during the pandemic, demand for throat candies (such as cough drops) rebounded in the latter half of 2022. While the market has shown continued growth in 2024, this trend appears to be short-term, with forecasts indicating stagnation by 2025.**

- **Demand for caramel and soft candies is steadily increasing, though the growth is modest. In contrast, the chewing gum market has been declining for over a decade. Most consumer demand for breath fresheners has shifted to breath mints, as many people prefer the convenience of tablets over chewing gum, which requires disposal. Despite manufacturers highlighting the health benefits of chewing gum, such as cavity prevention, the market continues to shrink. With several companies exiting the sector, Lotte and Mondelēz Japan now dominate the market share.**

Market Size

MARKET SIZE TRANSITION (BY VALUE, FY2018 TO FY2027)



(Unit: 1,000 USD)	Fiscal Year										CAGR
	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2018-2027
Sugar Confectionery Total	2,354,113	2,359,341	2,060,089	1,977,367	2,136,854	2,328,370	2,572,393	2,626,617	2,576,435	2,586,813	1.1%
Year-on-Year	101.9	100.2	87.3	96.0	108.1	109.0	110.5	102.1	98.1	100.4	
Candy	1,750,910	1,782,145	1,591,556	1,560,453	1,739,792	1,935,014	2,176,655	2,234,188	2,187,976	2,201,663	2.6%
Year-on-Year	103.6	101.8	89.3	98.0	111.5	111.2	112.5	102.6	97.9	100.6	
Caramel	61,875	56,383	51,618	52,942	54,265	54,397	54,265	54,265	54,265	54,265	-1.4%
Year-on-Year	96.8	91.1	91.5	102.6	102.5	100.2	99.8	100.0	100.0	100.0	
Chewing Gum	541,328	520,813	416,915	363,973	342,797	338,958	341,473	338,164	334,194	330,885	-5.3%
Year-on-Year	97.3	96.2	80.1	87.3	94.2	98.9	100.7	99.0	98.8	99.0	

※Candies include hard candy, soft candy, gummy candy, and tablets. Imports are included in candies, caramels, and chewing gums.

※The values for FY2024 and beyond are the forecasts.

(Estimated by Yano Research Institute)

- The market size of candies, caramels, and chewing gums in FY2023 totaled to $2,328,370 thousand USD (up by 9.0% year-on-year). Candies occupied 83.1% of the share, chewing gum 14.6%, and caramels 2.3%. In recent years, the candy market has been expanding, while the chewing gum market has been declining and the caramel market has remained at the same level as in preceding years.
- Since candies, caramels, and chewing gums are often consumed when people are on the go, the market shrank during the pandemic. Still, as Covid-19 increased awareness of self-care, the demand for throat candies (cough drops) recovered in the latter half of 2022. Driven further by the inbound tourist demand, the sales of candies have been strong from 2023. Meanwhile, gummy candies have become popular around 2021 among the young population, particularly Generation Z. Distribution of gummy candies, both domestic products and imports, rose significantly. The market is expanding with the enhancement of the sales floor at supermarkets, convenience stores, and drugstores. However, the growth of hard candies and gummy candies are expected to decelerate gradually, and the 'craze' for gummy candies will end around FY2025.

TRANSITION OF TOTAL IMPORT SIZE PER COUNTRY（HS CODE-BASED; FY2018 TO FY2023; VALUE & VOLUME）

- HS code 17.04 includes white chocolate (1704.90.230). However, in this report, data for white chocolate is excluded from "Sugar Confectionery" but included in "Chocolate."

《Import value transition》

FY2023	Unit:(1,000 USD)	Fiscal Year						CAGR
Ranking	Country name	2018	2019	2020	2021	2022	2023	2018-2023
1	China	7,883	6,545	8,292	14,041	32,344	27,356	28.3%
2	Germany	7,847	8,062	5,677	7,891	15,316	20,252	20.9%
3	Hungary	6,604	7,208	6,741	9,006	12,685	14,638	17.3%
4	Spain	7,073	6,168	5,118	9,857	16,086	10,083	7.3%
5	Thailand	5,956	5,384	4,927	5,355	6,263	9,738	10.3%
6	The Netherlands	7,160	6,439	6,000	6,796	8,109	7,563	1.1%
7	South Korea	3,026	2,561	2,479	5,439	9,827	7,248	19.1%
8	Türkiye	1,258	1,021	2,843	6,514	9,272	6,782	40.1%
	Other	17,478	15,894	15,870	19,059	28,763	26,882	9.0%
	Total	64,286	59,281	57,946	83,957	138,665	130,542	15.2%
	Year-on-Year（%)	105.2	92.2	97.7	144.9	165.2	94.1	

*Share of a total of top eight countries: 79.4%（FY2023）

- The total import value of sugar confectionery in FY2023 was $130,542 thousand USD（down 5.9% from preceding fiscal year）. The top share was occupied by China (21.0%), followed by Germany (15.5%) and Hungary (11.2%), which agrees with the ranking by total import volume.
- In FY2023, the imports from Türkiye totaled to $6,782 thousand USD, representing 5.2% of the total imports by value. Türkiye has been exhibiting a marked growth from FY2018, growing at a CAGR of 40.1%. While the country has ranked seventh based on the import volume, the ranking drops to eighth based on the import value. Unit price of the products from Türkiye is lower than that of South Korea.

《Import volume transition》

FY2023 Ranking	Unit:(ton) Country name	Fiscal Year 2018	2019	2020	2021	2022	2023	CAGR 2018-2023
1	China	1,497	1,407	1,958	2,690	5,256	4,994	27.2%
2	Germany	1,817	1,900	1,259	1,753	3,000	3,300	12.7%
3	Hungary	1,806	2,062	1,850	2,232	2,782	2,614	7.7%
4	Thailand	1,749	1,560	1,221	1,477	1,554	1,924	1.9%
5	Spain	1,318	1,143	975	1,637	2,264	1,494	2.5%
6	The Netherlands	1,635	1,348	1,240	1,343	1,573	1,293	-4.6%
7	Türkiye	382	343	745	1,624	1,914	1,213	26.0%
8	South Korea	594	452	436	759	1,213	855	7.6%
	Other	4,756	4,507	4,155	5,102	6,232	5,696	3.7%
	Total	14,959	14,270	13,402	17,858	24,573	22,528	8.5%
	Year-on-Year (%)	104.3	95.4	93.9	133.2	137.6	91.7	

*Share of a total of top eight countries: 78.5% (FY2023)

- The total import volume of sugar confectionery in FY2023 was 22,528 tons (down 8.3% from preceding fiscal year). The top share was occupied by China (22.2%), followed by Germany (14.6%) and Hungary (11.6%), which agrees with the ranking by total import value.
- In FY2023, the imports from Türkiye totaled to 1,213 tons, representing 5.4% of the total imports by volume. Türkiye has been exhibiting a significant growth from FY2018, growing at a CAGR of 26.0%. China shows the similar growth rate. While Türkiye has ranked eighth based on the import value, based on the import value the country exceeded South Korea, and therefore the ranking moved up to seventh.

《Unit price transition》

	Fiscal year 2018	2019	2020	2021	2022	2023	CAGR 2018-2023
Unit price (US$/kg)	4.3	4.2	4.3	4.7	5.6	5.8	6.2%
Y-o-Y (%)	1.0	1.0	1.0	1.1	1.2	1.0	

- The unit price of sugar confectionery had stayed flat at around $4.2 to 4.3 USD/kg until 2020. It rose to $4.7 USD/kg in 2021, and the price rise has been continued since 2022. Increased transportation costs, import costs increases stemming from weak yen, etc. should be the major factors of the unit price rise.

Key Information for Exporting to Japan

TARIFFS (HS CODE-BASED)

*General or Temporary rate shall be applied unless a specific tariff rate is shown in the tables below.

Statistical code		Description	Tariff rate						
H.S.code			Türkiye	General	Temporary	ASEAN	CPTPP	EU	US
17.04		Sugar confectionery (including white chocolate), not containing cocoa							
1704.10	000	Chewing gum, whether or not sugar-coated	24%	30%		24%	8.70%	8.70%	8.70%
1704.90		Other							
	100	1 Liquorice extract, not put up as	Free	Free		Free	Free	Free	
		2 Other	25%	35%					
	210	- Candies	25%			25%	For the Pooled Quota Free Other than for the Pooled Quota 25%	9.10%	
	220	- Caramels	25%			25%	9%	9.10%	
	290	- Other	25%			25%	For the Pooled Quota Free Other than for the Pooled Quota 25%	9.10%	

*HS code 17.04 includes white chocolate (1704.90.230). However, in this report, data for white chocolate is included in “Chocolate” and not “Sugar Confectionery.”

RELATED LEGAL SYSTEMS, REGULATIONS

Food Sanitation Act
(https://www.mhlw.go.jp/stf/seisakunitsuite/bunya/0000144562.html)

Main items	Regulatory authority	Regulations when importing
Food (confectionery, beverages, etc.) water, food additives, supplements, etc.	Ministry of Health, Labour and Welfare (MHLW)	Notification must be made to MHLW

《Outline》

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《Notification procedures》

(1) Preparing for documents needed for the notification:

- Notification Form for Importation of Foods, etc.
- Other documents
  - Description of raw materials and manufacturing processes (processed foods, etc., as required)
  - Health (sanitary) certificate (as required)
  - Test results (as required)

(2) Submit the completed Notification Form and other documentation to the quarantine station responsible for the port of import.

(3) The notification form and other documentation submitted are examined by a food sanitation inspector based on legislation to determine the necessity of inspections.

(4) When the document examination and cargo inspection have found that the cargo conforms to the act (the cargo "passed" the inspection), a "Certificate of Notification" will be returned to the importer from the MHLW quarantine station where the notification was first submitted.

《Recent amendments to Food Sanitation Act》

- To secure food safety against changes in environment surrounding food and food internationalization, the Food Sanitation Act has been amended in 2019 as follows:

(1) Reinforcement of wide-area food poisoning incident response

(2) Institutionalization of sanitation control in compliance with HACCP

(3) Obligation to notify health damage incident caused by intake of their food products containing the designated ingredients or components

(4) Introducing a positive list system for food containers and packaging
Reference of lists:
https://www.mhlw.go.jp/content/11130500/000638983.xlsm
https://www.mhlw.go.jp/content/11130500/000635356.xlsx

(5) Revision of licensing system and establishment of notification system for food business

(6) Obligation to notify food recall information to the government

(7) Further enhancement of import and export food safety certification:

For the purpose to confirm that the inspections and control have properly been conducted in the exporting countries for insurance of safety of imported foods, sanitation control based on HACCP and attachment of sanitation certificates of dairy products or aquatic food are required as a requisite of import.

《Other key points to notify》

- Food additives and pesticide residues are also restricted by the Food Sanitation Law. A positive list is provided here because of multiple instances of non-compliance with Japanese food safety laws have been identified among imported food products.

- Violations relating to the use of additives are frequently reported on imported candies (e.g., containing sorbic acid above the limit, use of undesignated additives like Quinoline Yellow and Azorubin). Exporters must note that Japan has a strict regulation on the use of food additives.

Food additives

- Food additives such as preservatives, sweeteners, colorants, and flavoring agents used in the process of food production or for the purpose of food processing and preservation are also regulated under the Food Sanitation Act. MHLW allows the use of food additives only when they have been judged by the Food Safety Commission as not inflicting any risks on human health, and only after specifying standards for ingredients and criteria for their use. MHLW also strives to ensure the safety of food additives that have been approved for use by, for example, surveying the per capita intake of food additives. See below for the positive list of food additives.

Excel https://www.mhlw.go.jp/content/001031538.xlsx

Pesticide residue

- To ensure that pesticide remained in food not to inflict on human health, MHLW sets the residue standards for all agricultural chemicals, feed additives, and animal drugs. The residue standards are set by the Food Safety Commission for each food within the range of amount not harmful to intake. Any foods with agricultural chemicals, etc. remained at the level surpassing the standard are banned for sale or import by the Food Sanitation Act.

- To ensure that pesticide residues do not exceed standards, the Ministry of Agriculture, Forestry and Fisheries (MAFF) sets standards for use according to the Agricultural Chemicals Regulation Act in accordance with residue standards. In addition, when food products are imported, they are inspected for pesticide residues at the quarantine station.

For the search on pesticide residue standard values: https://db.ffcr.or.jp/front/

Food Labeling Act (https://www.caa.go.jp/en/policy/food_labeling/)

Main items	Regulatory authority	Measures to take
All food items sold for consumers, etc.	Consumer Affairs Agency	Labeling on container packages in Japanese language

《Labeling details》

- Following nine items are needed to be labeled for foods sold to consumers:

Items to label	Descriptions
1. General name	Indicate common name that expresses the process food contents.
2. Storage condition	Storage condition of the product before opening the package should be indicated in accordance with the characteristics of the food, such as "Store at room temperature out of direct sunlight," "Store at 10°C or below", etc.
3. Use by date or Best before date	Label "use by date" for foods that are quick to deteriorate in quality, while label "best before date" for all other foods.
4. Ingredients used	· Indicate the most common name of raw materials used, in descending order of percentage by weight. · For composite materials that comprise two or more of raw materials, list all materials in descending order of percentage by weight within the parentheses after the composite material name.
5. Additives	Indicate the name of substance for additives, in descending order of percentage by weight, except for those used for nutritious enhancement, processing aids, or those that can be applied to the "carry-over" principle.
6. Content or solid volume and total content	Indicate content weight, content volume, or content quantity. Content weight should be labeled in grams or kilograms, content volume in milliliters or liters, and content quantity in units such as number of pieces.
7. Amount and calorific value of nutrients	For consumer processed foods, calories, amount of protein, fat, carbohydrate, and sodium should be indicated.
8. Name and address of food business operator	Of food business operators, indicate the name and address of the person who is responsible for food labeling descriptions.
9. Location of manufacturing or processing plant and name of manufacturer or processor, etc.	Indicate the location of manufacturing or processing plant and the name of manufacturer or processer. For imported products, indicate the location of the importer's office and the name of the importer.

- In addition to the above, some items need to be indicated if certain requirements are met. The following two items need particular notice.

Items to indicate	Descriptions
Allergen	· Allergen labeling is mandatory for processed foods made from specified raw materials and foods containing additives derived from specified raw materials. · Allergen labeling is recommended for processed foods made from ingredients equivalent to specified raw materials. **Mandatory to label - Specific 8 ingredients:** Shrimp, crab, walnut, wheat, soba (buckwheat), eggs, milk, peanut **Recommended to label – 20 ingredients equivalent to specified raw materials:** Almond, abalone, squid, salmon roe, orange, cashew nut, kiwi fruit, beef, sesame, salmon, mackerel, soybean, chicken, banana, pork, macadamia nut, peach, yam, apples, gelatin
Country of origin	For imported products, name of the country of origin should be indicated.

(Source: "An Introduction of Rule in Japan "Food Labeling Guide" - Aiming for Food Safety and Reliability" by Food Labeling Certification Association, Consumer Affairs Agency)

Market Information

MARKET TRENDS IN RECENT YEARS

《Candy》

(Unit: 1,000 USD)	Fiscal Year										CAGR
	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2018-2027
Candy	1,750,910	1,782,145	1,591,556	1,560,453	1,739,792	1,935,014	2,176,655	2,234,188	2,187,976	2,201,663	2.6%
Hard candy	590,960	608,828	547,945	511,548	531,401	573,754	692,873	727,947	694,858	681,623	1.6%
Soft candy	350,076	346,105	332,870	291,840	303,752	322,282	330,885	337,502	340,811	344,120	-0.2%
Gummy candy	421,547	410,959	362,650	420,224	516,842	620,078	727,947	727,947	691,549	694,858	5.7%
Tablet	328,767	358,017	301,767	277,281	283,899	312,355	317,649	320,958	324,267	327,576	0.0%
Imports	59,559	58,236	46,324	59,559	103,898	106,545	107,301	119,834	136,490	153,486	11.1%

※The figures for FY2024 and beyond are the forecasts.
(Estimated by Yano Research Institute)

- Candies are categorized into four groups by texture: hard candy, soft candy, gummy candy, and tablets (powder-pressed candies). Growth was observed in the domestic market of hard candies and gummy candies. The demand for hard candies was driven by the increasing awareness of self-care during the pandemic as well as the inbound tourist demand from FY2023. Gummy candies are also selling well across the board, especially among the younger generations. The strong sales have led domestic supermarkets, convenience stores, and drugstores to expand store shelves for gummy candies, creating a virtuous cycle for the market. In addition to the gummy candies that are eye-catching on social media, hard, chewy gummy candies became increasingly popular from FY2023.
- Sales of imported hard candies such as Ricola and Cavendish have not been expanding due to limited retail channels; they are sold either at international food stores or at the corner of supermarkets labeled "imports." Meanwhile, imported gummy candies are thriving with forms and textures clearly different from domestic products. As the overall gummy candy market expands, imported gummy candies are starting to seize the shelves of Japanese gummy candies. Brands like HARIBO, Trolli, and Yupi are increasing in popularity in particular.

《Caramel》

(Unit: 1,000 USD)	Fiscal Year										CAGR
	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2018-2027
Caramel	61,875	56,383	51,618	52,942	54,265	54,397	57,032	54,265	54,265	54,265	-1.4%
Japanese brands	60,221	55,059	50,956	50,956	52,942	52,942	55,709	52,942	52,942	52,942	-1.4%
Imported brands	1,654	1,324	662	1,985	1,324	1,456	1,324	1,324	1,324	1,324	-2.4%

※The figures for FY2024 and beyond are the forecasts.
(Estimated by Yano Research Institute)

- The caramel market has a steady demand. However, since its main customer base consists of seniors, companies are withdrawing successively. As a result, although manufacturers that continue to produce caramels are selling stably, the market is dwindling.
- People of various age groups enjoy the flavor of caramel. Japanese consumers tend to enjoy the caramel flavor in sweets such as cakes and biscuits.

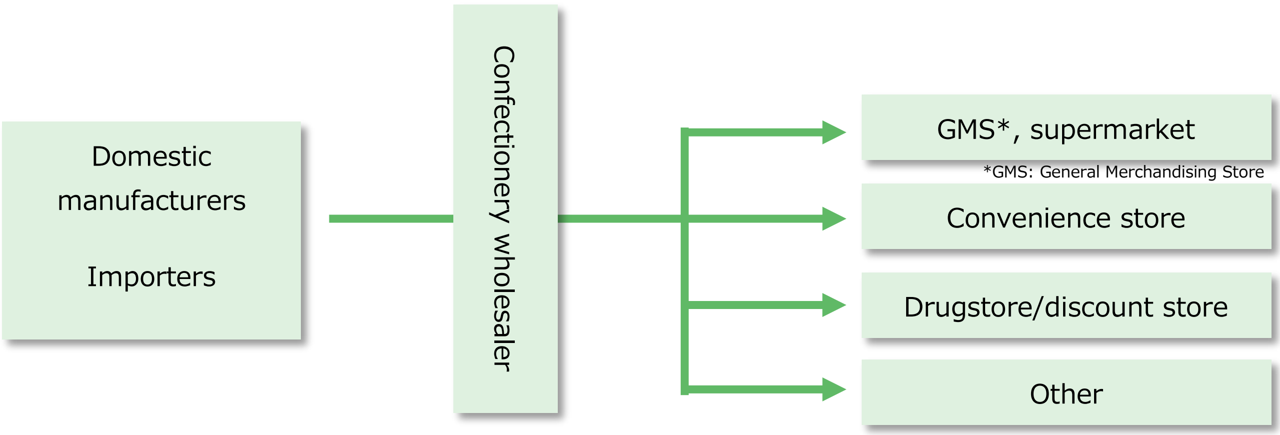
《Chewing Gum》

(Unit: 1,000 USD)	Fiscal Year 2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	CAGR 2018-2027
Chewing Gum	541,328	520,813	416,915	363,973	342,797	338,958	341,473	338,164	334,194	330,885	-5.3%
Japanese brands	524,783	504,268	403,679	350,738	330,885	328,238	330,885	327,576	324,267	320,958	-5.3%
Imported brands	16,544	16,544	13,235	13,235	11,912	10,721	10,588	10,588	9,927	9,927	-5.5%

※The figures for FY2024 and beyond are the forecasts.
(Estimated by Yano Research Institute)

- The chewing gum market has been scaling down. Because chewing gum requires consumers to discard them after chewing, consumers swapped chewing gum for tablets (mints) that need no disposal. During the pandemic, the use of masks and fewer face-to-face encounters shrank the demand for chewing gum further. Although the demand rebounded in FY2023 as the flow of people returned and product prices rose, manufacturers have not found a breakthrough. One of the three leading manufacturers terminated the chewing gum business because of the slumping market.
- Since the majority of demand for breath refresher has shifted to tablets (breath mints), chewing gums with health benefits, such as preventing cavities and improving cognitive performance of the brain, are on the rise.
-

DISTRIBUTION, SALES CHANNEL



(Created by Yano Research Institute)

- Sugar confectionery like candies, caramels, and chewing gums are sold by distributors such as supermarkets, convenience stores, and drugstores. Manufacturing retailers are rarely seen.
- Whether it is domestic products or imported products, sugar confectionery products in Japan are distributed to retail channels by confectionery wholesaler. At airports and train stations, sugar confectionery products are sold by tenants, such as convenience stores and drugstores.

POSITIONING OF DOMESTIC PRODUCTS AND IMPORTED PRODUCTS

《Candy》

Sales Transition (Unit: 1,000 USD)

FY2023 Ranking	Company name	2018	2019	2020	2021	2022	2023	CAGR 2018-2023
	UHA Mikakuto	205,149	221,693	218,384	211,766	218,384	231,619	2.5%
	Kanro	143,604	149,540	147,078	138,237	161,445	187,539	5.5%
	Meiji	213,202	182,648	140,957	157,501	187,943	164,781	-5.0%
	Morinaga	125,883	152,339	144,266	122,427	130,170	156,839	4.5%
	Kabaya Foods	74,118	111,177	100,589	107,868	120,442	145,589	14.5%
	Nobel Confectionery	90,001	93,310	78,751	78,221	90,001	111,177	4.3%
	Kasigai Seika	100,880	99,464	88,677	85,037	90,729	102,177	0.3%
	Ryukakusan	55,589	65,515	49,136	48,150	65,515	84,707	8.8%
	Fujiya	46,324	45,000	42,353	46,324	46,324	50,956	1.9%
	Lotte	58,897	56,912	50,956	41,427	44,703	45,993	-4.8%
	Other	637,263	604,546	530,408	523,493	584,137	653,636	0.5%
	Market total	1,750,910	1,782,145	1,591,556	1,560,453	1,739,792	1,935,014	2.0%

(Estimated by Yano Research Institute)

Market Share Transition (Unit: %)

FY2023 Ranking	Company name	2018	2019	2020	2021	2022	2023	% pt 2018→2023
1	UHA Mikakuto	11.7	12.4	13.7	13.6	12.6	12.0	0.3
2	Kanro	8.2	8.4	9.2	8.9	9.3	9.7	1.5
3	Meiji	12.2	10.2	8.9	10.1	10.8	8.5	-3.7
4	Morinaga	7.2	8.5	9.1	7.8	7.5	8.1	0.9
5	Kabaya Foods	4.2	6.2	6.3	6.9	6.9	7.5	3.3
6	Nobel Confectionery	5.1	5.2	4.9	5.0	5.2	5.7	0.6
7	Kasigai Seika	5.8	5.6	5.6	5.4	5.2	5.3	-0.5
8	Ryukakusan	3.2	3.7	3.1	3.1	3.8	4.4	1.2
9	Fujiya	2.6	2.5	2.7	3.0	2.7	2.6	-0.0
10	Lotte	3.4	3.2	3.2	2.7	2.6	2.4	-1.0
	Other	36.4	33.9	33.3	33.5	33.6	33.8	-2.6

(Estimated by Yano Research Institute)

- A total market share of top 10 companies totaled to 66.2% (FY2023). Many companies indicating positive CAGR attributes their growth to the sales increase of gummy candies and throat candies (cough drops).

《Caramel》

Sales Transition (Unit: 1,000 USD)

FY2023 Ranking	Company name	2018	2019	2020	2021	2022	2023	CAGR 2018-2023
	Morinaga	30,294	27,265	26,471	23,162	23,824	26,471	-2.7%
	Ezaki Glico	4,632	3,309	3,309	2,912	2,647	2,647	-10.6%
	Lotte	1,985	1,985	1,985	1,588	1,621	1,654	-3.6%
	Other	24,964	23,824	19,853	25,280	26,173	23,625	-1.1%
	Market total	61,875	56,383	51,618	52,942	54,265	54,397	-2.5%

(Estimated by Yano Research Institute)

Market Share Transition (Unit: %)

FY2023 Ranking	Company name	2018	2019	2020	2021	2022	2023	% pt 2018→2023
1	Morinaga	49.0	48.4	51.3	43.8	43.9	48.7	-0.3
2	Ezaki Glico	7.5	5.9	6.4	5.5	4.9	4.9	-2.6
3	Lotte	3.2	3.5	3.8	3.0	3.0	3.0	-0.2
	Other	40.3	42.3	38.5	47.8	48.2	43.4	3.1

(Estimated by Yano Research Institute)

- The concentration ratio (i.e., the proportion of total market share controlled by leading manufacturers) in the industry is rising, due to the declining trend of the entire market and the withdrawals along with market shrinkage. In FY2023, Morinaga, who ranked first, occupied one half of the market share.

《Chewing Gum》

Sales Transition (Unit:1,000 USD)
[company highlighted in light blue is a foreign-capital company]

FY2023 Ranking	Company name	2018	2019	2020	2021	2022	2023	CAGR 2018-2023
	Lotte	282,576	277,281	215,737	182,648	177,354	185,295	-8.1%
	Mondelēz Japan	59,559	56,912	39,706	39,706	36,397	38,383	-8.4%
	Meiji	47,647	39,706	27,794	19,853	13,235	0	-100.0%
	Other	151,545	146,913	133,677	121,766	115,810	115,280	-5.3%
	Market total	541,328	520,813	416,915	363,973	342,797	338,958	-8.9%

(Estimated by Yano Research Institute)

Market Share Transition（Unit: %）

FY2023 Ranking	Company name	2018	2019	2020	2021	2022	2023	% pt 2018→2023
1	Lotte	52.2	53.2	51.7	50.2	51.7	54.7	2.5
2	Mondelēz Japan	11.0	10.9	9.5	10.9	10.6	11.3	0.3
-	Meiji	8.8	7.6	6.7	5.5	3.9	0.0	-8.8
	Other	28.0	28.2	32.1	33.5	33.8	34.0	6.0

(Estimated by Yano Research Institute)

- Market shrinkage is followed by market withdrawals. Meiji, who had been in the third position, decided to exit the chewing gum market as of the end of FY2022. In FY2023, Lotte and Mondelēz Japan split Meiji’s share.

CHARACTERISTICS OF MAJOR PRODUCTS & TOP-SELLING PRODUCTS

《Candy》

Category	Throat candy (hard candy)	Soft candy	Gummy candy
			
Product name	Ryukakusan Herbal Throat Candy	Hi-CHEW	Kaju Gummy
Manufacturer	Ryukakusan	Morinaga	Meiji
Price	$2.0 USD (with tax)	$0.9 USD (with tax)	$1.1 USD (with tax)
	Japanese manufacturer	Japanese manufacturer	Japanese manufacturer

*Source of product images: brand company's websites

Hard gummies that increased popularity in the last few years

			
Product name	TOUGH GUMMY	Fettuccine gummi	NINJYA MESHI
Manufacturer	Kabaya Foods	Bourbon Corporation	UHA Mikakuto
Price	$1.6 USD (with tax)	$0.8 USD (with tax)	$0.9 USD (with tax)

*Source of product images: brand company's websites

Import gummy candies popular in Japan

			
Product name	HARIBO	Trolli	Yupi
Price	$1.4 USD (with tax)	$4.5 USD (with tax)	$1.1 USD (with tax)
Importer	Mitsubishi Shokuhin	Yutaka Trading Company	EIM

*Source of product images: brand company's websites

《Carmel, Tablets》

Category	Caramel	Tablet (mints)	Tablet (pressed candy)
			
Product name	Morinaga Milk Caramel	MINTIA	Morinaga Ramune
Manufacturer	Morinaga	Asahi Group Foods	Morinaga
Price	$1.1 USD (with tax)	$0.8 USD (with tax)	$0.6 USD (with tax)
Usage	—	Breath refresher	Taking glucose

*Source of product images: brand company's websites

《Chewing Gum》

			
Product name	XYLITOL	Clorets	RECALDENT
Manufacturer	Lotte	Mondelēz Japan	Mondelēz Japan
Price	$1.1 USD (with tax)	$1.1 USD (with tax)	$1.1 USD (with tax)
Characteristic	Cavity prevention	Breath refresher	Cavity prevention

*Source of product images: brand company's website

MAJOR IMPORTERS

■Mitsubishi Shokuhin Co., Ltd. (https://www.mitsubishi-shokuhin.com/en/)

Mitsubishi Shokuhin Co., Ltd. is a general food wholesaler, a subsidiary wholly owned by Mitsubishi Corporation. In addition to the wholesale business (distributing to domestic processed foods to GMS, supermarkets, convenience stores, drugstores, and discount stores), the company imports confectioneries from overseas. Imported brands include HARIBO (gummy candy), Ricola (cough drops), Cavendish (hard candy), Lindt (chocolate), and Walkers (shortbread cookies).

■TAKARA SHOJI GROUP (https://www.tskk.co.jp/)

Established in 1950, Takara Shoji is a trading company with a long history of importing foods and confectioneries. Imported brands include candies like Ambrosoli, Anis de Flavigny, Charms, Kopiko, and Rademaker, as well as other items of Kägi, Droste, Leonidas, Delser, and Falcone.

■YUTAKA TRADING COMPANY LIMITED (https://www.yutaka-trd.co.jp/)

Yutaka Trading imports various foods from Europe and the U.S., and wholesales in Japan. Imported items include confectioneries, cereals, and condiments. Imported brands include Trolli and Damla (candies), Café Tasse and Perlége (chocolates), and Vermeiren (biscuits).

■EIM CO., LTD. (https://www.eim.co.jp/)

A core business of EIM is the import and wholesale of the confectioneries produced in the Western countries like Europe and the U.S. In addition, the company imports products in bulk, repackages and resells it in an original design package. Imported brand include Yupi, Fini (gummy candies), Candy Blox (pressed candies), Hamlet (chocolate), Walker's Nonsuch (toffee), LACASA (chocolate), Villars (chocolate), Vanini (chocolates), Daelmans (waffle cookies), Goulibeur (short breads), and The Lorenz Bahlsen (snacks).

■SUZUSHO LTD. (https://www.suzusho.co.jp/)

Suzusho is a trading company with a long history of importing foods and confectionery, particularly those of Western brands. Imported brands include Original Gourmet lollipops (the U.S. brand, manufactured in Türkiye), Hershey’s (chocolate), Brookside (chocolate), TimTam (Biscuits, since April 2024), Socado (chocolate), altereco (chocolate), Andes (chocolate), Tengu(beef jerky), Frito Lay (snacks), Clipper (tea), Swiss Miss (cocoa mix) and Familia (cereal).

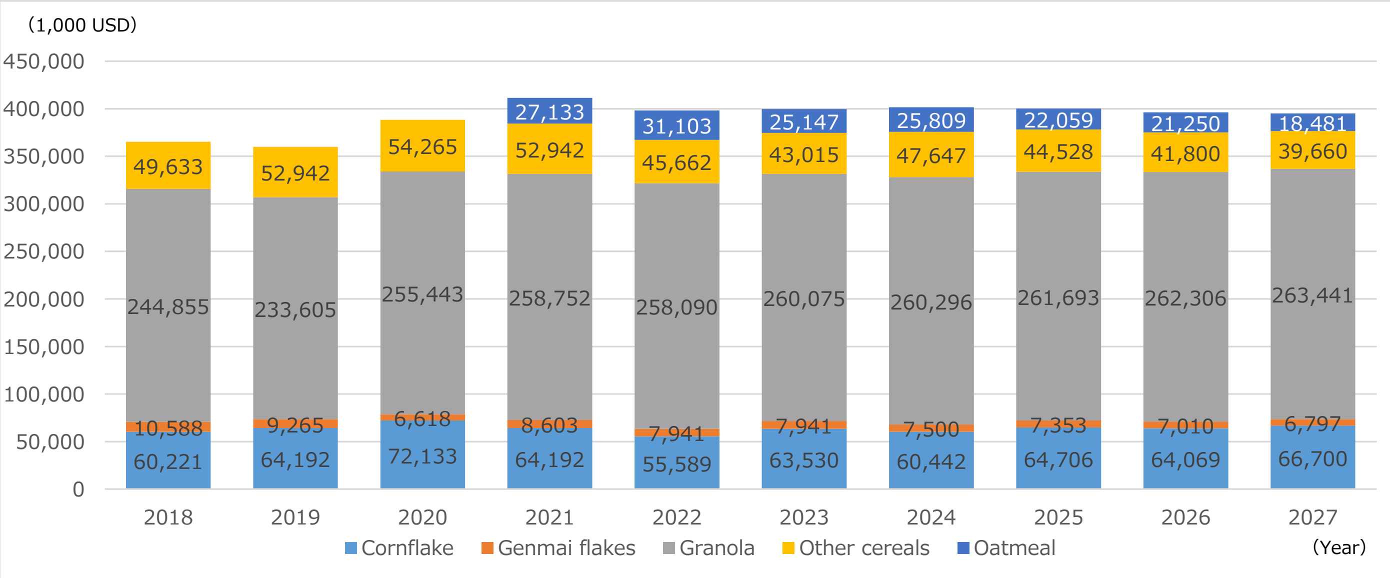
9. Cornflakes, Cereals

Key points of the market trend and characteristics

- **In recent years, Japan's breakfast culture has been evolving and becoming more diverse. Traditionally, rice and bread were the main breakfast staples, but there has been a growing trend of skipping breakfast, especially among younger generations. Many people are now opting for snack foods, such as biscuits, or protein shakes as their breakfast choice.**
- **The granola market grew significantly after fruit granola gained popularity around 2012. Cereal manufacturers expanded their offerings, aiming to position granola as "the third breakfast staple" in Japan, alongside bread and rice. However, the trend began to wane after the market reached its peak in 2016, when it was more than seven times the size it was in 2011. Although breakfast consumption increased during the pandemic as people spent more time at home, which temporarily boosted cereal demand, the growth proved to be short-lived.**
- **The COVID-19 crisis in 2020 led to an increased focus on health-conscious choices. During this time, oatmeal gained attention as weight loss influencers promoted it as a healthy option. However, many people avoided oatmeal due to the time and effort required for preparation, such as simmering it with water or milk. As a result, the surge in demand was brief, and the market has since slowed.**
- **In the business sector, demand for cereals at breakfast buffets in hotels has been growing, driven by the return of international tourists.**

Market Size

MARKET SIZE TRANSITION (BY VALUE, FY2018 TO FY2027)



(Unit: 1,000 USD)	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	CAGR 2018-2027
Cornflake, Cereals Total	365,297	360,003	388,459	411,621	398,385	399,709	401,694	400,339	396,434	395,079	0.9%
Year-on-Year	97.5	98.6	107.9	-	96.8	100.3	100.5	99.7	99.0	99.7	
Cornflake	60,221	64,192	72,133	64,192	55,589	63,530	60,442	64,706	64,069	66,700	1.1%
Year-on-Year	103.4	106.6	112.4	89.0	86.6	114.3	95.1	107.1	99.0	104.1	
Genmai flakes	10,588	9,265	6,618	8,603	7,941	7,941	7,500	7,353	7,010	6,797	-4.8%
Year-on-Year	84.2	87.5	71.4	130.0	92.3	100.0	94.4	98.0	95.3	97.0	
Granola	244,855	233,605	255,443	258,752	258,090	260,075	260,296	261,693	262,306	263,441	0.8%
Year-on-Year	93.9	95.4	109.3	101.3	99.7	100.8	100.1	100.5	100.2	100.4	
Other cereals	49,633	52,942	54,265	52,942	45,662	43,015	47,647	44,528	41,800	39,660	-2.5%
Year-on-Year	115.4	106.7	102.5	97.6	86.3	94.2	110.8	93.5	93.9	94.9	
Oatmeal				27,133	31,103	25,147	25,809	22,059	21,250	18,481	-6.2%
Year-on-Year				-	114.6	80.9	102.6	85.5	96.3	87.0	

*Cumulative total, from January to December. The data for Oatmeal prior to 2021 are not available.

*The figures up to 2023 are based on the data of Japan Snack Cereal Foods Association; the figures of 2024 and beyond are the estimates by Yano Research Institute.

- The domestic market size of cornflakes and cereals was $399,709 thousand USD in 2023 (up by 0.3% compared to the previous year). Although the demand for granola expanded significantly between 2012 and 2016, it lost momentum in the following years as the granola boom ended. Associated with the increase of people eating at home during the pandemic, the demand for cornflakes and cereals showed some signs of recovery, but this did not last either. The decline of the market size in 2022 and 2023 was due to the price rise. As people became concerned about gaining weight during the covid situation, oatmeal gained popularity as a healthy option. However, again, the popularity did not last. Under the circumstances, the market is sluggish since 2023.
- Meanwhile, inflow of foreign tourists to Japan from 2023 has been a market driver. Their consumption of cereal is on the rise; some eat cereals at breakfast buffet at hotels, and others purchase cereals at supermarkets in the vicinity of their accommodations (to eat breakfasts economically).
- In view of the market in 2023 by category, granola occupied the highest share of 65.1%, followed by cornflakes at 15.9%, oatmeal at 6.3%, genmai (brown rice) flakes at 2.0%, and other cereals at 10.8%.

TRANSITION OF TOTAL IMPORT SIZE PER COUNTRY（HS CODE-BASED, FY2018 TO FY2023; VALUE & VOLUME）

《Import value transition》 HS Code: 1104

FY2023 Ranking	Unit: (1,000 USD) Country name	2018	2019	2020	2021	2022	2023	CAGR 2018-2023
1	China	19,030	19,492	21,462	35,490	40,243	42,774	17.6%
2	Australia	6,202	5,645	7,842	8,780	17,767	11,115	12.4%
3	Finland	1,278	1,276	2,120	2,865	7,239	3,067	19.1%
4	Russia	451	398	725	1,521	667	2,800	44.1%
5	India	955	1,665	1,312	1,430	2,045	1,823	13.8%
6	Canada	343	555	1,076	1,994	3,663	1,593	35.9%
7	United States	987	1,080	2,897	5,458	4,910	1,538	9.3%
8	Latvia	62	6	75	690	1,258	766	65.5%
9	United Kingdom	454	399	612	541	732	482	1.2%
33	Türkiye	-	-	2.7	-	-	-	-
	Other	774	624	1,024	1,460	3,303	1,699	17.0%
	Total	30,535	31,139	39,145	60,229	81,829	67,657	17.2%
	Year-on-Year (%)	100.5	102.0	125.7	153.9	135.9	82.7	

*Concentration ratio of top nine countries: 97.5%（FY2023）

- The total import value of cornflakes and cereals（HS code: 1104）for FY2023 was $67,657 thousand USD（down by 17.3% from the preceding fiscal year）. While the imports fell on a year-on-year basis due to the stagnation of the domestic cornflake and cereal market and the weak yen, the import value grew significantly at a CAGR of 17.2% over the five years (FY2018 - FY2023). However, considering the fact that the CAGR by import volume stayed at 2.0%, and a huge gap between the growth rate of import by volume and by value between FY2020 and FY2022, the growth by value attributes to the global price rise and the weak yen.
- Based on the import value for FY2023 by country, the top three countries accounted for 84.2% of the total, with China leading at 63.2%, followed by Australia at 16.4%, and Finland at 4.5%. India, although third in import volume, ranked fifth in value due to its lower unit prices compared to Finland and Russia.
- A small volume of cereals was imported from Türkiye in 2020, but not in any other years.

《Import volume transition》 HS Code: 1104

FY2023 Ranking	Unit: (ton) Country name	Fiscal Year 2017	2018	2019	2020	2021	2022	2023	CAGR 2018-2023
1	China	44,133	43,175	42,773	34,349	43,831	38,270	43,365	0.1%
2	Australia	8,865	11,275	9,741	13,915	15,312	23,839	13,761	4.1%
3	India	3,269	3,619	4,402	4,565	4,408	4,722	4,031	2.2%
4	Russia	399	1,370	1,120	1,050	1,691	700	3,300	19.2%
5	Finland	1,799	2,098	2,047	3,071	3,907	7,834	2,912	6.8%
6	Canada	586	607	844	1,500	2,288	2,287	1,177	14.2%
7	United States	802	1,170	1,162	3,289	5,440	3,257	961	-3.9%
8	Latvia	83	120	11	143	1,204	1,526	833	47.3%
9	United Kingdom	951	982	875	1,423	1,078	1,201	706	-6.4%
33	Türkiye	-	-	-	5	-	-	-	-
	Other	1,216	1,149	953	1,495	1,921	3,689	1,354	3.3%
	Total	62,101	65,566	63,927	64,805	81,081	87,325	72,400	2.0%
	Year-on-Year (%)		105.6	97.5	101.4	125.1	107.7	82.9	

*Concentration ratio of top nine countries：98.1%（FY2023）

- The import volume of cornflakes & cereals (HS code: 1104) in FY2023 totaled to 72,400 tons （down by 17.1% from the previous fiscal year） , with a CAGR of 2.0% over 5 years (FY2018-2023).
- In FY2023, China held the largest share by country at 59.9%, followed by Australia at 19.0%, which was consistent with the ranking by import value. However, in terms of value, Finland and Russia ranked higher than India, in third and fourth positions, respectively. In terms of volume, India ranked third, suggesting that Indian cornflakes and cereals are priced lower.

《Unit price transition》 HS Code: 1104

	Fiscal year 2018	2019	2020	2021	2022	2023	CAGR 2018-2023
Unit price (US$/kg)	0.47	0.49	0.60	0.74	0.94	0.93	14.9%
Y-o-Y (%)	1.0	1.0	1.2	1.2	1.3	1.0	

- The unit price of cereals categorized in HS code 1104 has been rising gradually since around 2020 and greater increase has been seen since 2022. The Russia-Ukraine war lost the balance of demand and supply of grains globally, which caused the commodity price increase. It is assumed that this is the major background of the unit price increase of cereals.

《Import value transition》 HS Code: 1904

FY2023 Ranking	Unit: 1,000 USD Country name	Fiscal Year 2018	2019	2020	2021	2022	2023	CAGR 2018-2023
1	Belgium	7,094	6,456	6,482	7,194	6,827	8,157	2.8%
2	Australia	1,333	1,487	2,698	3,489	3,687	2,878	16.6%
3	United States	2,123	2,356	3,388	2,429	2,869	1,975	-1.4%
4	France	758	586	888	1,092	722	792	0.9%
5	Germany	777	822	690	1,316	868	743	-0.9%
6	Czechia	166	351	470	976	997	626	30.4%
7	United Kingdom	414	424	703	718	581	531	5.1%
8	Poland	22	171	203	363	591	342	73.5%
9	Switzerland	172	206	198	138	256	257	8.4%
	Other	740	723	651	599	625	657	-2.3%
	Total	13,598	13,582	16,371	18,316	18,023	16,958	4.5%
	Year-on-Year (%)	94.3	99.9	120.5	111.9	98.4	94.1	

*Concentration ratio of top nine countries: 92.6% (FY2023)

*Import from Türkiye: None

- The import value of HS code 1904 totaled to $16,958 thousand USD in FY2023 (down by 5.9% from the preceding fiscal year) , showing a CAGR of 4.5% over 5 years between FY2018 and FY2023.
- Viewing the import of FY2023 by value per country, top three countries accounted for 76.7% of the total, with Belgium leading at 48.1%, followed by Australia at 17.0%, and the United States at 11.6%. Czechia ranked third by volume but sixth by value, suggesting that its unit price is lower. Vice versa, the United States ranked third by value but fourth by volume, and France ranked fourth but ninth by volume, indicating their unit prices are higher.
- As per 2018-2023 import data, there was no record of imports from Türkiye.

《Import volume transition》 HS Code: 1904

FY2023 Ranking	Unit:(ton) Country name	2017	2018	2019	2020	2021	2022	2023	CAGR 2018-2023
1	Belgium	5,133	4,956	4,577	4,752	4,731	3,964	3,463	-6.9%
2	Australia	845	836	985	1,685	1,896	1,609	1,142	6.4%
3	Czechia	154	89	228	333	705	665	332	30.2%
4	United States	492	569	635	969	571	586	262	-14.4%
5	Poland	30	13	98	138	335	398	227	78.2%
6	United Kingdom	434	220	239	451	428	276	223	0.3%
7	Germany	383	399	438	313	578	331	210	-12.0%
8	Latvia	0	0	0	0	3	29	194	776.2%
9	France	238	239	197	272	317	173	175	-6.1%
	Other	467	395	464	603	216	206	133	-19.6%
	Total	8,176	7,715	7,862	9,516	9,780	8,237	6,360	-3.8%
	Year-on-Year（%）		94.4	101.9	121.0	102.8	84.2	77.2	

Fiscal Year (2017–2023)

*Concentration ratio of top nine countries: 97.9%（FY2023）

*Import value from Türkiye: None

*CAGR of Latvia：over 3 fiscal years (FY2021-2023)

- The total import volume of HS code 1904 in FY2023 was 6,360 tons (down by 22.8% compared to the previous fiscal year), and a CAGR of 5 years (FY2018-2023) was -3.8%.
- In view of the import volume transition of the top nine countries, decline of import volume is observed even among the countries that showed growth until FY2021. Amidst the stagnation of the domestic cereals market, rising import prices stemming from the global price rise and the weak yen shrank the demand for imports.

《Unit price transition》 HS Code: 1904

	2018	2019	2020	2021	2022	2023	CAGR 2018-2023
Unit price (US$/kg)	1.8	1.7	1.7	1.9	2.2	2.7	8.6%
Y-o-Y (%)	1.0	1.0	1.0	1.1	1.2	1.2	

Fiscal year (2018–2023)

- Unit prices for cereals with HS code 1904 (mainly those mixed with several cereals and dried fruits or syrups and imported as a final product) have been gradually increasing since around 2020, with a further increase from 2022 onwards. The outbreak of the Russia-Ukraine war is believed to have caused a global imbalance between supply and demand for cereals, leading to higher prices. In Japan, rising transport costs, and heightened import costs due to the weakening of yen could be additional factors that have raised the unit price.

Key Information for Exporting to Japan

TARIFFS (HS CODE-BASED)

*General or Temporary rate shall be applied unless a specific tariff rate is shown in the tables below.

- Cornflakes and cereals in this report include those imported as raw materials for food processing in Japan (HS code: 1104) and those imported as finished products (HS code: 1904), which are the products of multiple grains mixed with dried fruits and syrup.

Statistical code		Description	Tariff rate						
H.S.code			Türkiye	General	Temporary	ASEAN	CPTPP	EU	US
11.04		Cereal grains otherwise worked (for example, hulled, rolled, flaked, pearled, sliced or kibbled), except rice of heading 10.06; germ of cereals, whole, rolled, flaked or ground							
		Rolled or flaked grains :							
1104.12	000	Of oats	6%	20%		Free	Free	Free	Free
1104.19		Of other cereals							
		1 Of wheat or triticale	(132 yen/kg)	(132 yen/kg)					
		*〔1〕Of wheat							
	111	- Imported by Japanese Government according to Article 42 of "The Law for Stabilization of Supply-Demand and Price of Staple Food", imported to be purchased and sold by Japanese Government in response to a joint application by seller to and purchaser from Japanese Government according to Article 43 of the Law or imported with certification of Minister of Agriculture, Forestry and Fishery according to the cabinet order concerning wheat and others provided by the cabinet order provided in column 3 of paragraph 1 of Article 45 of the law	25%		25%		For the tariff rate quota in Japan's Schedule to the WTO Agreement 25% Other (For the Pooled Quota) Free	Other than for the tariff rate quota in Japan's Schedule to the WTO Agreement, and for the Pooled Quota Free	
	119	- Other	31.40 yen/kg		31.40 yen/kg		31.40yen/kg		

Statistical code		Description	Tariff rate						
H.S.code			Türkiye	General	Temporary	ASEAN	CPTPP	EU	US
		*〔2〕Of triticale							
	121	- Imported by Japanese Government according to Article 42 of "The Law for Stabilization of Supply-Demand and Price of Staple Food", imported to be purchased and sold by Japanese Government in response to a joint application by seller to and purchaser from Japanese Government according to Article 43 of the Law or imported with certification of Minister of Agriculture, Forestry and Fishery according to the cabinet order concerning wheat and others provided by the cabinet order provided in column 3 of paragraph 1 of Article 45 of the law	20%		20%		For the tariff rate quota in Japan's Schedule to the WTO Agreement 20% Other (For the Pooled Quota) Free	Other than for the tariff rate quota in Japan's Schedule to the WTO Agreement, and for the Pooled Quota Free	
	129	- Other	31.4 yen/kg		31.40 yen/kg		31.40yen/kg		
		2 Of maize (corn) or rice							
	210	(1) Of maize (corn)	21.3%	25%		Free	Free	Free	
		(2) Of rice	(402 yen/kg)	(402 yen/kg)					
	250	- Imported by Japanese Government according to Article 30 of "The Law for Stabilization of Supply-Demand and Price of Staple Food", imported to be purchased and sold by Japanese Government in response to a joint application by seller to and purchaser from Japanese Government according to Article 31 of the Law, imported with certification of Minister of Agriculture, Forestry and Fishery according to the cabinet order concerning rice and others provided by the cabinet order provided in column 3 of paragraph 1 of Article 34 of the law	25%		25%		For the tariff rate quota in Japan's Schedule to the WTO Agreement 25% Other (For Pooled Quota(Treatment for Australia)) Free		
	290	- Other	49 yen/kg		49 yen/kg		49yen/kg		

Statistical code		Description	Tariff rate						
H.S.code			Türkiye	General	Temporary	ASEAN	CPTPP	EU	US
		3 Of barley	(107 yen/kg)	(107 yen/kg)					
	410	- Imported by Japanese Government according to Article 42 of "The Law for Stabilization of Supply-Demand and Price of Staple Food", imported to be purchased and sold by Japanese Government in response to a joint application by seller to and purchaser from Japanese Government according to Article 43 of the Law or imported with certification of Minister of Agriculture, Forestry and Fishery according to the cabinet order concerning wheat and others provided by the cabinet order provided in column 3 of paragraph 1 of Article 45 of the law	20%		20%		For the tariff rate quota in Japan's Schedule to the WTO Agreement 20% Other (For the Pooled Quota) Free	Other than for the tariff rate quota in Japan's Schedule to the WTO Agreement, and for the Pooled Quota Free	
	490	- Other	33.20 yen/kg		33.20 yen/kg		33.20yen/kg		
	300	4 Other	8.5%	20%		Free	Free	Free	
		Other worked grains (for example, hulled, pearled, sliced or kibbled) :							
1104.22	000	Of oats	6.0%	20%		Free	4.30%	4.40%	4.30%
1104.23		Of maize (corn)							
	010	1 Intended for use in the manufacture of cornflakes	#16.2%	#16.2%		Free	2%	2%	
	090	2 Other	18.0%	25%		Free	Free	Free	Free
1104.29		Of other cereals							
		1 Of wheat or triticale	(106 yen/kg)	(106 yen/kg)					
		* 〔1〕 Of wheat							
	111	- Imported by Japanese Government according to Article 42 of "The Law for Stabilization of Supply-Demand and Price of Staple Food", imported to be purchased and sold by Japanese Government in response to a joint application by seller to and purchaser from Japanese Government according to Article 43 of the Law or imported with certification of Minister of Agriculture, Forestry and Fishery according to the cabinet order concerning wheat and others provided by the cabinet order provided in column 3 of paragraph 1 of Article 45 of the law	25%		25%		For the tariff rate quota in Japan's Schedule to the WTO Agreement 25% Other (For the Pooled Quota) Free	Other than for the tariff rate quota in Japan's Schedule to the WTO Agreement, and for the Pooled Quota Free	

Statistical code		Description	Tariff rate						
H.S.code			Türkiye	General	Temporary	ASEAN	CPTPP	EU	US
	119	- Other	27.40 yen/kg		27.40 yen/kg		27.40yen/kg		
		*〔2〕Of triticale							
	121	- Imported by Japanese Government according to Article 42 of "The Law for Stabilization of Supply-Demand and Price of Staple Food", imported to be purchased and sold by Japanese Government in response to a joint application by seller to and purchaser from Japanese Government according to Article 43 of the Law or imported with certification of Minister of Agriculture, Forestry and Fishery according to the cabinet order concerning wheat and others provided by the cabinet order provided in column 3 of paragraph 1 of Article 45 of the law	20%		20%		For the tariff rate quota in Japan's Schedule to the WTO Agreement 20% Other (For the Pooled Quota) Free	Other than for the tariff rate quota in Japan's Schedule to the WTO Agreement, and for the Pooled Quota Free	
	129	- Other	27.40 yen/kg		27.40 yen/kg		27.40yen/kg		
		2 Of rice	(402 yen/kg)	(402 yen/kg)					
	250	- Imported by Japanese Government according to Article 30 of "The Law for Stabilization of Supply-Demand and Price of Staple Food", imported to be purchased and sold by Japanese Government in response to a joint application by seller to and purchaser from Japanese Government according to Article 31 of the Law, imported with certification of Minister of Agriculture, Forestry and Fishery according to the cabinet order concerning rice and others provided by the cabinet order provided in column 3 of paragraph 1 of Article 34 of the law	25%		25%		For the tariff rate quota in Japan's Schedule to the WTO Agreement 25% Other (For Pooled Quota(Treat ment for Australia)) Free		
	290	- Other	49 yen/kg		49 yen/kg		49yen/kg		

Statistical code		Description	Tariff rate						
H.S.code			Türkiye	General	Temporary	ASEAN	CPTPP	EU	US
	290	- Other	49 yen/kg		49 yen/kg		49yen/kg		
		3 Of barley	(130 yen/kg)	(130 yen/kg)					
	410	- Imported by Japanese Government according to Article 42 of "The Law for Stabilization of Supply-Demand and Price of Staple Food", imported to be purchased and sold by Japanese Government in response to a joint application by seller to and purchaser from Japanese Government according to Article 43 of the Law or imported with certification of Minister of Agriculture, Forestry and Fishery according to the cabinet order concerning wheat and others provided by the cabinet order provided in column 3 of paragraph 1 of Article 45 of the law	20%		20%		For the tariff rate quota in Japan's Schedule to the WTO Agreement 20% Other (For the Pooled Quota) Free	Other than for the tariff rate quota in Japan's Schedule to the WTO Agreement, and for the Pooled Quota Free	
	490	- Other	38.60 yen/kg		38.60 yen/kg		38.60yen/kg		
		4 Other	17.0%	20%					
	310	- Of buckwheat				Free	Free	Free	Free
	390	- Other				Free	Free	Free	Free
1104.30	000	Germ of cereals, whole, rolled, flaked or ground	17.0%	20%		17%	Free	11.60%	
19.04		Prepared foods obtained by the swelling or roasting of cereals or cereal products (for example, corn flakes); cereals (other than maize (corn)) in grain form or in the form of flakes or other worked grains (except flour, groats and meal), pre-cooked, or otherwise prepared, not elsewhere specified or included							
1904.10		Prepared foods obtained by the swelling or roasting of cereals or cereal products							

Statistical code		Description	Tariff rate						
H.S.code			Türkiye	General	Temporary	ASEAN	CPTPP	EU	US
	010	1 Breakfast cereals other than obtained by merely the swelling or roasting of rice, wheat, triticale or barley	11.5%	15.40%			1.40%	1.40%	
		2 Prepared foods containing not less than 50% by weight of those obtained by merely swelling or roasting of rice, wheat, triticale or barley							
		(1) Of rice	(402 yen/kg)	(402 yen/kg)					
	211	- Imported by Japanese Government according to Article 30 of "The Law for Stabilization of Supply-Demand and Price of Staple Food", imported to be purchased and sold by Japanese Government in response to a joint application by seller to and purchaser from Japanese Government according to Article 31 of the Law, imported with certification of Minister of Agriculture, Forestry and Fishery according to the cabinet order concerning rice and others provided by the cabinet order provided in column 3 of paragraph 1 of Article 34 of the law	19.2%		19.2%		For the tariff rate quota in Japan's Schedule to the WTO Agreement 19.2% Other (Treatment for Australia) Free		
	212	- Other	49 yen/kg		49 yen/kg		49yen/kg		
		(2) Of wheat and triticale		(100 yen/kg)					

Statistical code		Description	Tariff rate						
H.S.code			Türkiye	General	Temporary	ASEAN	CPTPP	EU	US
	221	- Imported by Japanese Government according to Article 42 of "The Law for Stabilization of Supply-Demand and Price of Staple Food", imported to be purchased and sold by Japanese Government in response to a joint application by seller to and purchaser from Japanese Government according to Article 43 of the Law or imported with certification of Minister of Agriculture, Forestry and Fishery according to the cabinet order concerning wheat and others provided by the cabinet order provided in column 3 of paragraph 1 of Article 45 of the law	19.2%		19.2%		For the tariff rate quota in Japan's Schedule to the WTO Agreement 19.2% Other Free	Other than for the tariff rate quota in Japan's Schedule to the WTO Agreement Free	
	229	- Other	26.20 yen/kg		26.20 yen/kg		26.20yen/kg		
		(3) Of barley		(75 yen/kg)					
	231	- Imported by Japanese Government according to Article 42 of "The Law for Stabilization of Supply-Demand and Price of Staple Food", imported to be purchased and sold by Japanese Government in response to a joint application by seller to and purchaser from Japanese Government according to Article 43 of the Law or imported with certification of Minister of Agriculture, Forestry and Fishery according to the cabinet order concerning wheat and others provided by the cabinet order provided in column 3 of paragraph 1 of Article 45 of the law	19.2%		19.2%		For the tariff rate quota in Japan's Schedule to the WTO Agreement 19.2% Other Free	Other than for the tariff rate quota in Japan's Schedule to the WTO Agreement Free	
	239	- Other	26.60 yen/kg		26.60 yen/kg		26.60yen/kg		

Statistical code		Description	Tariff rate						
H.S.code			Türkiye	General	Temporary	ASEAN	CPTPP	EU	US
	300	3 Other		19.20%		16.30%	5.90%	5.90%	
1904.20		Prepared foods obtained from unroasted cereal flakes or from mixtures of unroasted cereal flakes and roasted cereal flakes or swelled cereals							
	100	1 Breakfast cereals	11.5%	15.40%			1.40%	1.40%	
		2 Prepared foods containing not less than 50% by weight of those obtained by merely swelling of rice, wheat, triticale or barley							
		(1) Of rice	(402 yen/kg)	(402 yen/kg)					
	211	- Imported by Japanese Government according to Article 30 of "The Law for Stabilization of Supply-Demand and Price of Staple Food", imported to be purchased and sold by Japanese Government in response to a joint application by seller to and purchaser from Japanese Government according to Article 31 of the Law, imported with certification of Minister of Agriculture, Forestry and Fishery according to the cabinet order concerning rice and others provided by the cabinet order provided in column 3 of paragraph 1 of Article 34 of the law	19.2%		19.2%		For the tariff rate quota in Japan's Schedule to the WTO Agreement 19.2% Other (Treatment for Australia) Free		
	212	- Other	49 yen/kg		49 yen/kg		49yen/kg		
		(2) Of wheat and triticale	(100 yen/kg)	(100 yen/kg)					

Statistical code		Description	Tariff rate						
H.S.code			Türkiye	General	Temporary	ASEAN	CPTPP	EU	US
	221	- Imported by Japanese Government according to Article 42 of "The Law for Stabilization of Supply-Demand and Price of Staple Food", imported to be purchased and sold by Japanese Government in response to a joint application by seller to and purchaser from Japanese Government according to Article 43 of the Law or imported with certification of Minister of Agriculture, Forestry and Fishery according to the cabinet order concerning wheat and others provided by the cabinet order provided in column 3 of paragraph 1 of Article 45 of the law	19.2%		19.2%		For the tariff rate quota in Japan's Schedule to the WTO Agreement 19.2% Other Free	Other than for the tariff rate quota in Japan's Schedule to the WTO Agreement Free	
	229	- Other	26.20 yen/kg		26.20 yen/kg		26.20yen/kg		
		(3) Of barley	(75 yen/kg)	(75 yen/kg)					
	231	- Imported by Japanese Government according to Article 42 of "The Law for Stabilization of Supply-Demand and Price of Staple Food", imported to be purchased and sold by Japanese Government in response to a joint application by seller to and purchaser from Japanese Government according to Article 43 of the Law or imported with certification of Minister of Agriculture, Forestry and Fishery according to the cabinet order concerning wheat and others provided by the cabinet order provided in column 3 of paragraph 1 of Article 45 of the law	19.2%		19.2%		For the tariff rate quota in Japan's Schedule to the WTO Agreement 19.2% Other Free	Other than for the tariff rate quota in Japan's Schedule to the WTO Agreement Free	
	239	- Other	26.60 yen/kg		26.60 yen/kg		26.60yen/kg		
	300	3 Other	16.3%	19.20%			5.90%	5.90%	

RELATED LEGAL SYSTEMS, REGULATIONS

Food Sanitation Act
(https://www.mhlw.go.jp/stf/seisakunitsuite/bunya/0000144562.html)

Main items	Regulatory authority	Regulations when importing
Food (confectionery, beverages, etc.) water, food additives, supplements, etc.	Ministry of Health, Labour and Welfare (MHLW)	Notification must be made to MHLW

《Outline》

- **The Food Sanitation Act aims to prevent sanitation hazards resulting from eating and drinking and to ensure food safety thereby protecting citizens' health. The Act also applies to imported foods.**
- **A person who intends to import food, etc. for the purpose of sale or to use in business is obliged to make an import notification from this perspective to ensure food safety, based on Article 27 of the Food Sanitation Act.**
- **Notifications are accepted at the quarantine station, where a food sanitation inspector examines the foods and products to confirm their compliance with the criteria and standards of the Food Sanitation Act, and the necessity of an inspection. (A consultation service is available.)**

《Notification procedures》

(1) Preparing for documents needed for the notification:
- ◆ Notification Form for Importation of Foods, etc.
- ◆ Other documents
  - · Description of raw materials and manufacturing processes (processed foods, etc., as required)
  - · Health (sanitary) certificate (as required)
  - · Test results (as required)

(2) Submit the completed Notification Form and other documentation to the quarantine station responsible for the port of import.

(3) The notification form and other documentation submitted are examined by a food sanitation inspector based on legislation to determine the necessity of inspections.

(4) When the document examination and cargo inspection have found that the cargo conforms to the act (the cargo "passed" the inspection), a "Certificate of Notification" will be returned to the importer from the MHLW quarantine station where the notification was first submitted.

《Recent amendments to Food Sanitation Act》

· To secure food safety against changes in environment surrounding food and food internationalization, the Food Sanitation Act has been amended in 2019 as follows:

(1) Reinforcement of wide-area food poisoning incident response

(2) Institutionalization of sanitation control in compliance with HACCP

(3) Obligation to notify health damage incident caused by intake of their food products containing the designated ingredients or components

(4) Introducing a positive list system for food containers and packaging
Reference of lists:
https://www.mhlw.go.jp/content/11130500/000638983.xlsm
https://www.mhlw.go.jp/content/11130500/000635356.xlsx

(5) Revision of licensing system and establishment of notification system for food business

(6) Obligation to notify food recall information to the government

(7) Further enhancement of import and export food safety certification:

For the purpose to confirm that the inspections and control have properly been conducted in the exporting countries for insurance of safety of imported foods, sanitation control based on HACCP and attachment of sanitation certificates of dairy products or aquatic food are required as a requisite of import.

《Other key points to notify》

- Food additives and pesticide residues are also restricted by the Food Sanitation Law. A positive list is provided here because multiple instances of non-compliance with Japanese food safety laws have been identified among imported food products.

- Violations are rarely reported on breakfast cereals (HS code 1904). However, exporters should be aware that cases of mold contamination, resulting from inadequate sorting or improper storage conditions, have been reported for cereals imported as raw materials, such as worked grains of oats and barleys.

Food additives

- Food additives such as preservatives, sweeteners, colorants, and flavoring agents used in the process of food production or for the purpose of food processing and preservation are also regulated under the Food Sanitation Act. MHLW allows the use of food additives only when they have been judged by the Food Safety Commission as not inflicting any risks on human health, and only after specifying standards for ingredients and criteria for their use. MHLW also strives to ensure the safety of food additives that have been approved for use by, for example, surveying the per capita intake of food additives. See below for the positive list of food additives.

Excel https://www.mhlw.go.jp/content/001031538.xlsx

Pesticide residue

- To ensure that pesticide remained in food not to inflict on human health, MHLW sets the residue standards for all agricultural chemicals, feed additives, and animal drugs. The residue standards are set by the Food Safety Commission for each food within the range of amount not harmful to intake. Any foods with agricultural chemicals, etc. remained at the level surpassing the standard are banned for sale or import by the Food Sanitation Act.

- To ensure that pesticide residues do not exceed standards, the Ministry of Agriculture, Forestry and Fisheries (MAFF) sets standards for use according to the Agricultural Chemicals Regulation Act in accordance with residue standards. In addition, when food products are imported, they are inspected for pesticide residues at the quarantine station.

For the search on pesticide residue standard values: https://db.ffcr.or.jp/front/

Food Labeling Act (https://www.caa.go.jp/en/policy/food_labeling/)

Main items	Regulatory authority	Measures to take
All food items sold for consumers, etc.	Consumer Affairs Agency	Labeling on container packages in Japanese language

《Labeling details》

・ Following nine items are needed to be labeled for foods sold to consumers:

Items to label	Descriptions
1. General name	Indicate common name that expresses the process food contents.
2. Storage condition	Storage condition of the product before opening the package should be indicated in accordance with the characteristics of the food, such as "Store at room temperature out of direct sunlight," "Store at 10°C or below", etc.
3. Use by date or Best before date	Label "use by date" for foods that are quick to deteriorate in quality, while label "best before date" for all other foods.
4. Ingredients used	・Indicate the most common name of raw materials used, in descending order of percentage by weight. ・For composite materials that comprise two or more of raw materials, list all materials in descending order of percentage by weight within the parentheses after the composite material name.
5. Additives	Indicate the name of substance for additives, in descending order of percentage by weight, except for those used for nutritious enhancement, processing aids, or those that can be applied to the "carry-over" principle.
6. Content or solid volume and total content	Indicate content weight, content volume, or content quantity. Content weight should be labeled in grams or kilograms, content volume in milliliters or liters, and content quantity in units such as number of pieces.
7. Amount and calorific value of nutrients	For consumer processed foods, calories, amount of protein, fat, carbohydrate, and sodium should be indicated.
8. Name and address of food business operator	Of food business operators, indicate the name and address of the person who is responsible for food labeling descriptions.
9. Location of manufacturing or processing plant and name of manufacturer or processor, etc.	Indicate the location of manufacturing or processing plant and the name of manufacturer or processer. For imported products, indicate the location of the importer's office and the name of the importer.

- In addition to the above, some items need to be indicated if certain requirements are met. The following two items need particular notice.

Items to indicate	Descriptions
Allergen	· Allergen labeling is mandatory for processed foods made from specified raw materials and foods containing additives derived from specified raw materials. · Allergen labeling is recommended for processed foods made from ingredients equivalent to specified raw materials. **Mandatory to label - Specific 8 ingredients:** Shrimp, crab, walnut, wheat, soba (buckwheat), eggs, milk, peanut **Recommended to label – 20 ingredients equivalent to specified raw materials:** Almond, abalone, squid, salmon roe, orange, cashew nut, kiwi fruit, beef, sesame, salmon, mackerel, soybean, chicken, banana, pork, macadamia nut, peach, yam, apples, gelatin
Country of origin	For imported products, name of the country of origin should be indicated.

(Source: "An Introduction of Rule in Japan "Food Labeling Guide" - Aiming for Food Safety and Reliability" by Food Labeling Certification Association, Consumer Affairs Agency)

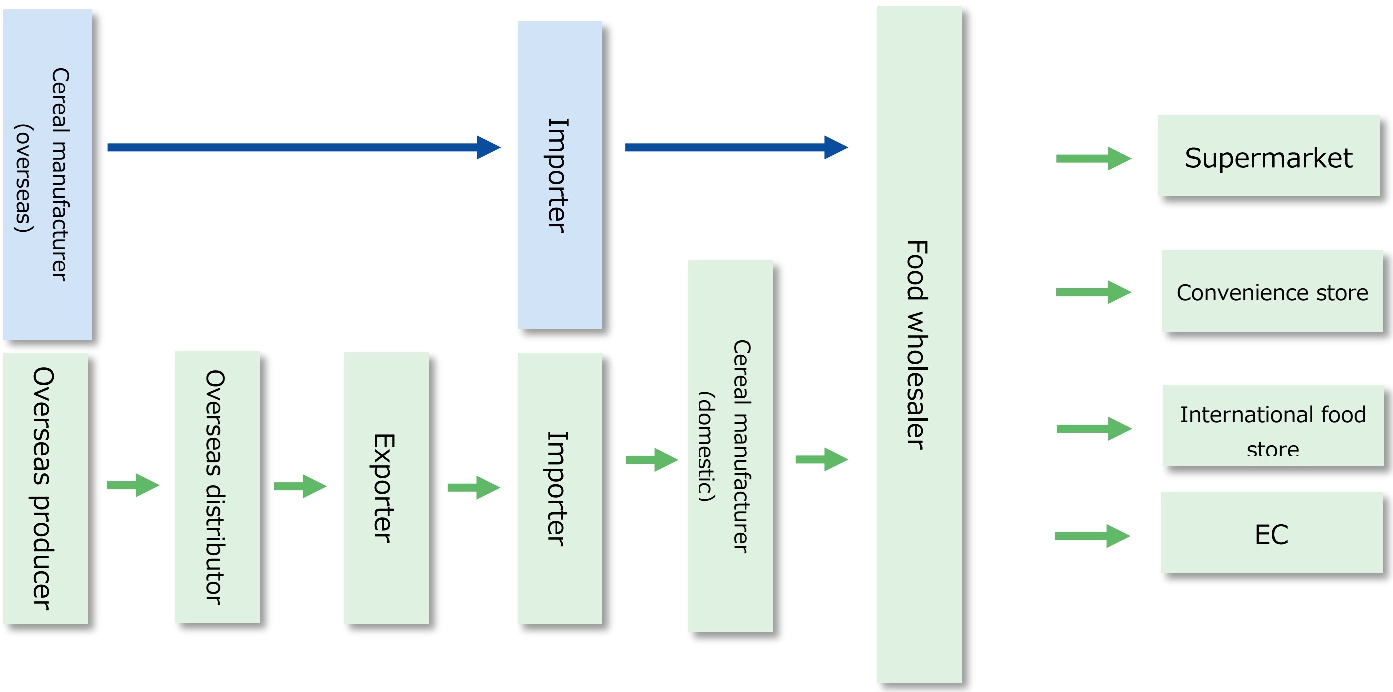
Market Information

MARKET TRENDS IN RECENT YEARS

- Breakfast culture in Japan is changing in recent years. While rice and bread had been conventional breakfast staples, some people are starting to eat snack foods like biscuits or drink protein shakes as their breakfast. Moreover, the number of people not eating breakfast is increasing, particularly among the younger generations.
- The market of granola expanded as fruit granola, a mix of granola with dried fruits, became popular around 2012. Cereal manufacturers increased the variety of fruit granola in an expectation to position granola as "the third breakfast staple" in Japan. Fruit granola was accepted by young single-households and young families, as an alternative to bread and rice. However, the trend began to fade as the market size peaked at $287,208 thousand USD in 2016 (more than seven times the size of 2011), and by 2019, the market size scaled down to $233,605 thousand USD. Meanwhile, as COVID situation increased the number of people eating breakfast at home, the market trend turned for the better until 2022. In 2023, society went back to normal, and the price rise made people cut back on spending. Under the circumstances, people are returning to conventional breakfast like rice and bread. Although the granola market size is hovering at around $258,090 thousand USD, we believe the consumption volume is dropping.
- The Covid crisis in 2020 made people more health oriented. Meanwhile, oatmeal came under the spotlight as weight loss influencers endorsed oatmeal as a healthy option. Nevertheless, people avoided choosing oatmeal because they did not bother to take time for preparation, such as simmering with water or milk. The surge in demand was short-lived, peaking in 2022, and the market has since slowed down. To leverage the market growth, cereal manufacturers developed oatmeal that requires no cooking, which can be served as it is as yogurt topping.

- Among the business channels, the demand for cereals is growing at hotels, which are used for their breakfast buffet. Although the decrease of domestic and international guests during the pandemic hit the hotel business, the demand has been stable from 2023. It is also worth noting that supermarkets near hotels are seeing strong sales of cereals. Foreign tourists booking rooms in hotels without breakfast are buying cereals to eat in their room.

DISTRIBUTION, SALES CHANNEL



(Created by Yano Research Institute)

- Cereals imported from overseas include (1) the cereals as raw materials to be processed by domestic food manufacturers, which will be distributed as Japanese products, and (2) the cereals produced by overseas manufacturers that are ready for distribution.
- Cereals imported as raw materials, such as oat grains, are processed by domestic cereal manufacturers into finished products. The finished products are distributed to retailers like supermarkets via food wholesalers.
- The importer(s) of finished products are different from the importer(s) of cereal grains as raw materials for food processing.

POSITIONING OF DOMESTIC PRODUCTS AND IMPORTED PRODUCTS

Sales Trends (Unit:1,000 USD)

FY2023		Fiscal Year						CAGR
Ranking	Company name	2018	2019	2020	2021	2022	2023	2018-2023
1	Calbee	157,614	166,104	183,310	163,457	160,148	172,722	1.8%
2	Kellog's Japan	107,868	108,530	112,501	133,016	125,074	118,457	1.9%
3	Nissin Cisco	70,809	72,133	77,427	86,030	84,045	85,368	3.8%
	Other	29,005	13,235	15,221	29,118	29,118	23,162	-4.4%
	Market total	365,297	360,003	388,459	411,621	398,385	399,709	1.8%

Market Share Transition (Unit:%;percentage points for increase/decrease)

FY2023		Fiscal Year						Market share Incr/Decr*
Ranking	Company name	2018	2019	2020	2021	2022	2023	2018→2023
1	Calbee	43.1	46.1	47.2	39.7	40.2	43.2	0.1
2	Kellog's Japan	29.5	30.1	29.0	32.3	31.4	29.6	0.1
3	Nissin Cisco	19.4	20.0	19.9	20.9	21.1	21.4	2.0
	Other	7.9	3.7	3.9	7.1	7.3	5.8	-2.1

(Estimated by Yano Research Institute)

- Granola makes up over 60% of the Japanese cereal market. Fruit granola, which is typically mixed with dried fruits and syrup, is primarily intended to be consumed with milk or yogurt. In this category, "Furugura" series (Calbee) has the top share, competing with "Marugoto Granola" (Kellog's Japan) and "Gorogura" (Nissin Cisco). To meet the demand for healthier foods stemming from the trend of healthy eating, manufacturers launched low sugar granola and sugar free granola.
- (Although Kellog's Japan is foreign-capital company) Kellog's Japan positions itself differently from other imported ready-to-eat cereal brands for domestically producing "Corn Frosties" and "All-Bran" and competing with Japanese brands like Calbee and Nissin Cisco. Kellog's Japan stands out from competitors with "All-Bran" and "Kids Corn Frosties." Nissin Cisco is also embarking on differentiation strategy by producing "Ciscorn" series that also target children, and by enhancing "Oishii Oatmeal" series, which sparked the oatmeal boom in Japan.
- In the category of ready-to-eat imported cereals, such as Familia, Weetabix, and Quaker are sold at international foods stores as well as "imported foods" and "cereals" shelves at supermarkets.

CHARACTERISTICS OF MAJOR PRODUCTS & TOP-SELLING PRODUCTS

《Major Domestic Products》

	Calbee	Kellog's Japan	Nissin Cisco
Granola	 380g/$4.1USD (with tax)	 400g/$5.1USD (with tax)	 320g/$4.1USD (with tax)
For children	—	 210g/$2.4USD (with tax)	 220g/$2.4 USD (with tax)
Oatmeal	 400g/$4.1USD (with tax)	 330g/$2.6USD (with tax)	 180g/$3.0 USD (with tax)
Other		 250g/$2.7USD (with tax)	

(Source of product images: brand company's websites)

《Imported Products》

			
Importer: Suzusho $5.6 USD (with tax)	Importer: Suzusho $6.7 USD (with tax)	Importer: Suzusho $7.5 USD (with tax)	Importer: Yutaka Trading Company $2.5USD (with tax)

(Source of product images: brand company's websites)

MAJOR IMPORTERS

《Raw Material Importers》

■**Mitsubishi Corporation (https://www.mitsubishicorp.com/jp/ja/index.html)**

■**Mitsui & Co., Ltd. (https://www.mitsui.com/jp/ja/index.html)**

■**Itochu Corporation. (https://www.itochu.co.jp/)**

■**Marubeni foods (https://www.marubeni-foods.co.jp/)**

■**SC Foods Co., Ltd. (https://www.scfoods.co.jp/)**

■**Kanematsu Corporation (https://www.kanematsu.co.jp/)**

■**Toyota Tsusho Foods Corporation (https://www.toyotsu-shokuryo.com/)**

■**Cargill Japan (https://www.cargill.co.jp/)**

《Importers of Finished Products》

■Suzusho Ltd. (https://www.suzusho.co.jp/)

Suzusho is a trading company with a long history of importing foods and confectionery, particularly those of Western brands. Imported brands include cereals such as Alpen, Weetabix and Familia. Other imported products include Hershey's (chocolate), Brookside (chocolate), TimTam (biscuits), Tengu (beef jerky), FritoLay (snacks), Clipper (tea), and Swiss Miss (cocoa mix).

■Yutaka Trading Company Limited (https://www.yutaka-trd.co.jp/)

Yutaka Trading imports various foods from Europe and the U.S., and wholesales in Japan. The company imports Quaker cereals. Other imported brands include Trolli (candies), Damla (candies), Café Tasse (chocolate), Perlége (chocolate), and Vermeiren (biscuits).

■Kitano Shoji Co., Ltd. (https://www.kitano-kk.co.jp/)

Established in 1948, Kitano Shoji has over 70 years of experience in importing food and confectionery from countries around the world. Imported products range widely from wafers to curry powder, including brands that have a top share in the country of origin. Examples of brands Kitano imports include ALARA (cereal), Loacker (wafers), Bahlsen (biscuits), Hellema (biscuits), Taste Delight (biscuits), Biscottificio Belli (biscuits), Préférés d'Amandine (tart), Pierre BISCUITERIE (biscuits), Biscuiterie de Abbaye (biscuits), and MILLER'S (biscuits).

10. Soups, Concentrated Dashi (Stocks and Broths)

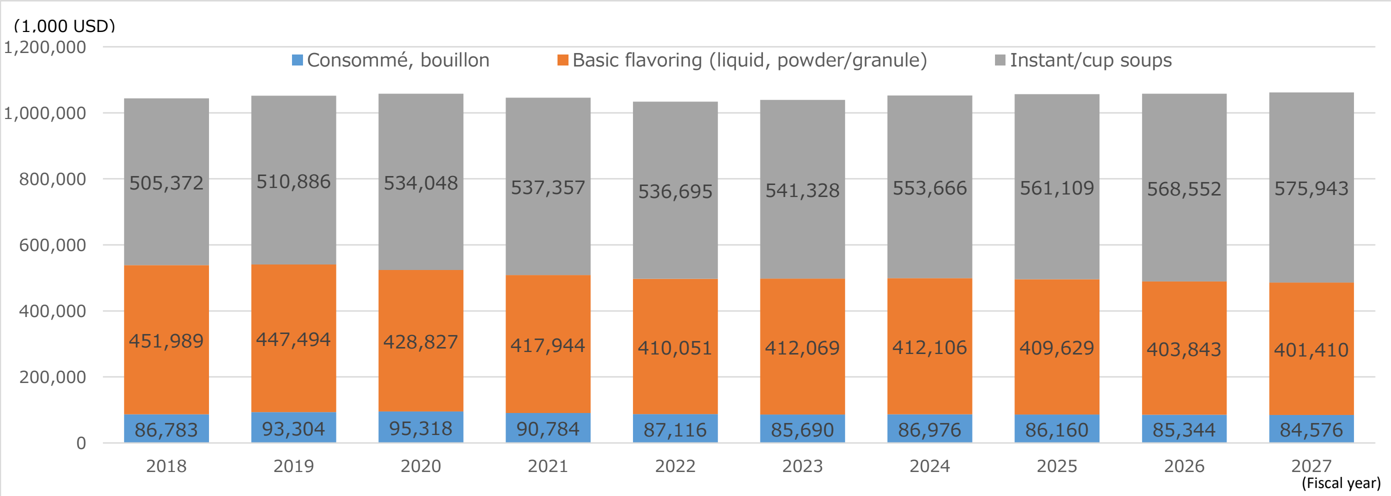
This chapter describes the market of soups and concentrated dashi supplied in the form of liquid, powder, or granule, that is the total of basic flavor made from konbu seaweed, bonito, other fish extracts, broths/stocks (including consommé and bouillon), as well as instant soups and cup soups (i.e., powdered soups in a paper cup).

Key points of the market trend and characteristics

- **The market of soups, concentrated broths and stocks in Japan has been stable. In detail, while consommé/bouillon and "dashi" flavoring products show a declining tendency, the market of instant and cup soups is expanding. It is because of declining home cooking opportunities that diminished demand for flavoring merchandises, replaced by demand for readily eaten products.**
- **There are not many imported products in the market, as can see from top ranked companies occupying market shares are domestic manufacturers.**
- **Countries with large import value for Japan are China, Australia and New Zealand. It seems that soups for Chinese cuisines and beef stocks are imported from these countries.**
- **Famous overseas brands are "Maggi" and "Campbell's", both of which have Japanese subsidiaries. These products are available at supermarkets and imported food stores.**
- **Other imported products seem to be sold through distributors and parallel import at imported food stores or at mail order businesses.**

Market Size

MARKET SIZE TRANSITION AND FORECAST (BY VALUE, FY2018 TO FY2027)



(1,000 USD)		Fiscal year 2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	CAGR 2018-2027
Soup, concentrated dashi		1,044,144	1,051,684	1,058,193	1,046,085	1,033,862	1,039,087	1,052,748	1,056,898	1,057,739	1,061,929	0.2%
	YoY	98.4	100.7	100.6	98.9	98.8	100.5	101.3	100.4	100.1	99.0	
Consommé, bouillon		86,783	93,304	95,318	90,784	87,116	85,690	86,976	86,160	85,344	84,576	-0.3%
	YoY	97.1	107.5	102.2	95.2	96.0	98.4	101.5	99.1	99.1	99.1	
Dashi and Flavoring products (liquid, powder/granule)		451,989	447,494	428,827	417,944	410,051	412,069	412,106	409,629	403,843	401,410	-1.3%
	YoY	98.0	99.0	95.8	97.5	98.1	100.5	100.0	99.4	98.6	99.0	
Instant/cup soups		505,372	510,886	534,048	537,357	536,695	541,328	553,666	561,109	568,552	575,943	1.5%
	YoY	99.0	101.1	104.5	100.6	99.9	100.9	102.3	101.3	101.3	101.3	

*Figure for FY2023 is the projection, and for FY2024 is the forecast.
(Estimated by Yano Research Institute)

- Keeping stability for some years, the market size of soups and concentrated dashi (stocks and broths) in Japan has reached $1,039,087 thousand USD, up by 0.5% from previous fiscal year. The market size is projected to attain $1,061,929 thousand USD by FY2027, with CAGR from FY2018 to FY2027 expected to be 0.2%.
- There are extensive products, from consommé or bouillon (processed from bones or meat flesh extracts), concentrated dashi, to instant or cup soups to be consumed immediately. Dashi products are those made from bonitos, konbu seaweed, and other fish materials added with tastes, mainly used for Japanese meal cooking. On the other hand, consommé and bouillon are often used for western food cooking.
- Demand for merchandise for cooking such as consommé, bouillon, or other broths and stocks are gradually on a decline. It is because of less opportunities to proactively cook at home, due to increased double-income households and those households with a few members. Another reason is decreased volume per use due to a tendency of reducing salt intake.
- Meanwhile, the instant and cup soups market is on the rise, responding to increasing demand for improved convenience and saving time. The merchandise matches the current Japanese lifestyle, with increased single households and individual eating habits.

- The above trends are likely to continue. Therefore, the overall market levels off, as a slight decline in consommé, bouillon, and other broths and stocks is expected, while instant and cup soups are projected to rise.

TOTAL IMPORT SIZE BY COUNTRY (HS-CODE BASED, FY2018 TO FY2023, VALUE & VOLUME)

《Import value transition》

FY2023 Ranking	(1,000 USD) Country name	Fiscal year 2018	2019	2020	2021	2022	2023	CAGR 2018-2023
1	China	4,227	6,233	7,393	9,815	17,416	13,622	26.4%
2	Australia	7,136	6,185	7,450	8,291	11,102	13,140	13.0%
3	New Zealand	3,636	3,347	1,957	2,381	4,272	7,996	17.1%
4	France	4,794	5,358	5,191	6,361	7,211	7,701	9.9%
5	Canada	2,761	3,001	2,811	3,171	4,308	5,577	15.1%
6	United States	8,993	7,338	6,305	4,789	4,859	5,328	-9.9%
7	Thailand	4,610	5,813	3,326	3,471	4,411	4,492	-0.5%
8	Belgium	12	1,217	1,865	3,582	4,616	3,709	217.3%
9	South Korea	3,582	3,413	2,259	2,059	2,756	2,606	-6.2%
10	Taiwan	2,171	1,983	2,093	1,708	2,209	2,146	-0.2%
22	Türkiye	16.7	0.0	0.0	1.8	5.2	17.9	1.3%
	Other	2,838	2,114	2,146	2,520	3,153	3,197	2.4%
	Total	44,774	46,001	42,795	48,149	66,319	69,532	9.2%
	YoY (%)	102.1	102.7	93.0	112.5	137.7	104.8	

*Cumulative total, from April to March
*Share of top 10 countries: 95.4% (2023)
*Actual import from Türkiye: 17.9 thousand USD , share 0.03%, ranks 22nd (2023)

- As Chinese foods are popular in Japan, import value from China is high. There are abundant products imported from China, such as chicken stock granules, thick chicken broth (Paitan broth), cleared broth (Chintan broth) etc., indispensable at various Chinese restaurants.
- Australia at the second position is considered because of production of "Campbell's" soups, While New Zealand at the third is seemingly because of a part production of Nestle's brand, "Maggi" bouillon.

《Import volume transition》

FY2023 Ranking	Unit:(ton) Country name	Fiscal year 2018	2019	2020	2021	2022	2023	CAGR 2018-2023
1	Australia	4,297	3,828	4,582	4,914	4,825	4,867	2.5%
2	Thailand	2,174	3,130	2,172	2,019	2,209	1,919	-2.5%
3	New Zealand	1,239	1,161	710	691	1,070	1,473	3.5%
4	South Korea	1,673	1,769	1,251	1,203	1,484	1,395	-3.6%
5	France	1,389	1,493	1,265	1,478	1,516	1,360	-0.4%
6	China	1,145	1,331	928	1,091	1,348	1,360	3.5%
7	Canada	777	882	860	954	1,013	1,144	8.0%
8	United States	3,620	3,250	2,952	1,683	1,061	1,120	-20.9%
9	Belgium	3	360	511	897	977	695	201.3%
10	Taiwan	767	703	792	604	638	582	-5.4%
20	Türkiye	10	-	-	1	1	5	-11.5%
	Other	978	751	700	711	806	721	-5.9%
	Total	18,073	18,656	16,721	16,246	16,948	16,641	-1.6%
	YoY (%)	103.7	103.2	89.6	97.2	104.3	98.2	

*Cumulative total, from April to March
*Share of top 10 countries: 95.6% (2023)
*Actual import from Türkiye: 5.36 tons, share 0.03%, ranks at 20th (2023)

《Unit price transition》

	Fiscal year 2018	2019	2020	2021	2022	2023	CAGR 2018-2023
Unit price (US$/kg)	2.48	2.47	2.56	2.96	3.91	4.18	11.0%
Year-on-Year (%)	98.4	99.5	103.8	115.8	132.0	106.8	

- While CAGR (FY2018-FY2023) for import value is positive 9.2%, CAGR for import volume is expected to be minus 1.6%.
- In addition to soaring prices for ingredients such as meat, fish, and vegetables, increased logistics costs have raised CAGR (FY2018-FY2023) for unit price transition (yen/kg) at 11.0%, a double-digit growth.

Key Information for Exporting to Japan

TARIFFS (HS CODE-BASED)

*General or Temporary rate shall be applied unless a specific tariff rate is shown in the tables below.

Statistical code		Description	Tariff rate						
H.S. code			Türkiye	General	Temporary	ASEAN	CPTPP	EU	US
21.04		Soups and broths and preparations therefor; homogenised composite food preparations							
2104.10		Soups and broths and preparations therefor							
	010	1 Of vegetable, in airtight containers	7%	7%		Free	Free	Free	Free
	020	2 Other	8.4%	8.4%		Free	Free	Free	Free
2104.20	000	Homogenised composite food preparations	6%	12.8%		Free	Free	Free	Free

RELATED LEGAL SYSTEMS, REGULATIONS

Food Sanitation Act (https://www.mhlw.go.jp/stf/seisakunitsuite/bunya/0000144562.html)

Main items	Regulatory authority	Regulations when importing
Food (confectionery, beverages, etc.) water, food additives, supplements, etc.	Ministry of Health, Labour and Welfare (MHLW)	Notification must be made to MHLW

《Outline》

- **The Food Sanitation Act aims to prevent sanitation hazards resulting from eating and drinking and to ensure food safety thereby protecting citizens' health. The Act also applies to imported foods.**
- **A person who intends to import food, etc. for the purpose of sale or to use in business is obliged to make an import notification from this perspective to ensure food safety, based on Article 27 of the Food Sanitation Act.**
- **Notifications are accepted at the quarantine station, where a food sanitation inspector examines the foods and products to confirm their compliance with the criteria and standards of the Food Sanitation Act, and the necessity of an inspection. (A consultation service is available.)**

《Notification procedures》

(1) Preparing for documents needed for the notification:
- ◆ Notification Form for Importation of Foods, etc.
- ◆ Other documents

- Description of raw materials and manufacturing processes (processed foods, etc., as required)
- Health (sanitary) certificate (as required)
- Test results (as required)

(2) Submit the completed Notification Form and other documentation to the quarantine station responsible for the port of import.

(3) The notification form and other documentation submitted are examined by a food sanitation inspector based on legislation to determine the necessity of inspections.

(4) When the document examination and cargo inspection have found that the cargo conforms to the act (the cargo "passed" the inspection), a "Certificate of Notification" will be returned to the importer from the MHLW quarantine station where the notification was first submitted.

《Recent amendments to Food Sanitation Act》

- To secure food safety against changes in environment surrounding food and food internationalization, the Food Sanitation Act has been amended in 2019 as follows:

1. Reinforcement of wide-area food poisoning incident response
2. Institutionalization of sanitation control in compliance with HACCP
3. Obligation to notify health damage incident caused by intake of their food products containing the designated ingredients or components
4. Introducing a positive list system for food containers and packaging
   Reference of lists:
   https://www.mhlw.go.jp/content/11130500/000638983.xlsm
   https://www.mhlw.go.jp/content/11130500/000635356.xlsx
5. Revision of licensing system and establishment of notification system for food business
6. Obligation to notify food recall information to the government
7. Further enhancement of import and export food safety certification:
   For the purpose to confirm that the inspections and control have properly been conducted in the exporting countries for insurance of safety of imported foods, sanitation control based on HACCP and attachment of sanitation certificates of dairy products or aquatic food are required as a requisite of import.

《Other key points to notify》

Food additives and pesticide residues are also regulated by the Food Sanitation Act. Since there are often publicized cases of violations of food additives and pesticide residues in imported foods, a positive list is provided here.

<u>Food additives</u>

- Food additives such as preservatives, sweeteners, colorants, and flavoring agents used in the process of food production or for the purpose of food processing and preservation are also regulated under the Food Sanitation Act. MHLW allows the use of food additives only when they have been judged by the Food Safety Commission as not inflicting any risks on human health, and only after specifying standards for ingredients and criteria for their use. MHLW also strives to ensure the safety of food additives that have been approved for use by, for example, surveying the per capita intake of food additives. See below for the positive list of food additives.

Excel https://www.mhlw.go.jp/content/001031538.xlsx

Pesticide residue

- To ensure that pesticide remained in food not to inflict on human health, MHLW sets the residue standards for all agricultural chemicals, feed additives, and animal drugs. The residue standards are set by the Food Safety Commission for each food within the range of amount not harmful to intake. Any foods with agricultural chemicals, etc. remained at the level surpassing the standard are banned for sale or import by the Food Sanitation Act.
- To ensure that pesticide residues do not exceed standards, the Ministry of Agriculture, Forestry and Fisheries (MAFF) sets the usage standard based on the Agricultural Chemicals Regulation Act. When foods are being imported, they are inspected for pesticide residues at the quarantine station.

For the search on pesticide residue standard values: https://db.ffcr.or.jp/front/

Food Labeling Act（https://www.caa.go.jp/en/policy/food_labeling/）

Main items	Regulatory authority	Measures to take
All food items sold for consumers, etc.	Consumer Affairs Agency	Labeling on container packages in Japanese language

《Labeling details》

- Following nine items are needed to be labeled for foods sold to consumers:

Items to label	Descriptions
1. General name	Indicate common name that expresses the process food contents. Some names such as “mayonnaise” “ketchup” need to meet certain requirements.
2. Storage condition	Storage condition of the product before opening the package should be indicated in accordance with the characteristics of the food, such as “Store at room temperature out of direct sunlight”, “Store at 10°C or below”, etc.
3. Use by date or Best before date	Label “use by date” for foods that are quick to deteriorate in quality, while label “best before date” for all other foods.
4. Ingredients used	· Indicate the most common name of raw materials used, in descending order of percentage by weight. · For composite materials that comprise two or more of raw materials, list all materials in descending order of percentage by weight within the parentheses after the composite material name.
5. Additives	Indicate the name of substance for additives, in descending order of percentage by weight, except for those used for nutritious enhancement, processing aids, or those that can be applied to the “carry-over” principle.
6. Content or solid volume and total content	Indicate content weight, content volume, or content quantity. Content weight should be labeled in grams or kilograms, content volume in milliliters or liters, and content quantity in units such as number of pieces.

7. Amount and calorific value of nutrients	For consumer processed foods, calories, amount of protein, fat, carbohydrate, and sodium should be indicated.
8. Name and address of food business operator	Of food business operators, indicate the name and address of the person who is responsible for food labeling descriptions.
9. Location of manufacturing or processing plant and name of manufacturer or processor, etc.	Indicate the location of manufacturing or processing plant and the name of manufacturer or processer. For imported products, indicate the location of the importer's office and the name of the importer.

- In addition to the above, some items need to be indicated if certain requirements are met. The following two items need particular notice.

Items to indicate	Descriptions
Allergen	· Allergen labeling is mandatory for processed foods made from specified raw materials and foods containing additives derived from specified raw materials. · Allergen labeling is recommended for processed foods made from ingredients equivalent to specified raw materials. **Mandatory to label - Specific 8 ingredients:** Shrimp, crab, walnut, wheat, soba (buckwheat), eggs, milk, peanut **Recommended to label – 20 ingredients equivalent to specified raw materials:** Almond, abalone, squid, salmon roe, orange, cashew nut, kiwi fruit, beef, sesame, salmon, mackerel, soybean, chicken, banana, pork, macadamia nut, peach, yam, apples, gelatin
Country of origin	For imported products, name of the country of origin should be indicated.

(Source: "An Introduction of Rule in Japan "Food Labeling Guide" - Aiming for Food Safety and Reliability" by Food Labeling Certification Association, Consumer Affairs Agency)

Market Information

MARKET TRENDS IN RECENT YEARS

(1,000 USD)		Fiscal year 2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	CAGR 2018-2027
Soup, concentrated dashi		1,044,144	1,051,684	1,058,193	1,046,085	1,033,862	1,039,087	1,052,748	1,056,898	1,057,739	1,061,929	0.2%
	YoY	98.4	100.7	100.6	98.9	98.8	100.5	101.3	100.4	100.1	99.0	
Consommé, bouillon		86,783	93,304	95,318	90,784	87,116	85,690	86,976	86,160	85,344	84,576	-0.3%
	YoY	97.1	107.5	102.2	95.2	96.0	98.4	101.5	99.1	99.1	99.1	
Dashi and Flavoring products (liquid, powder/granule)		451,989	447,494	428,827	417,944	410,051	412,069	412,106	409,629	403,843	401,410	-1.3%
	YoY	98.0	99.0	95.8	97.5	98.1	100.5	100.0	99.4	98.6	99.0	
Instant/cup soups		505,372	510,886	534,048	537,357	536,695	541,328	553,666	561,109	568,552	575,943	1.5%
	YoY	99.0	101.1	104.5	100.6	99.9	100.9	102.3	101.3	101.3	101.3	

*Figure for FY2023 is the projection, and for FY2024 is the forecast.
(Estimated by Yano Research Institute)

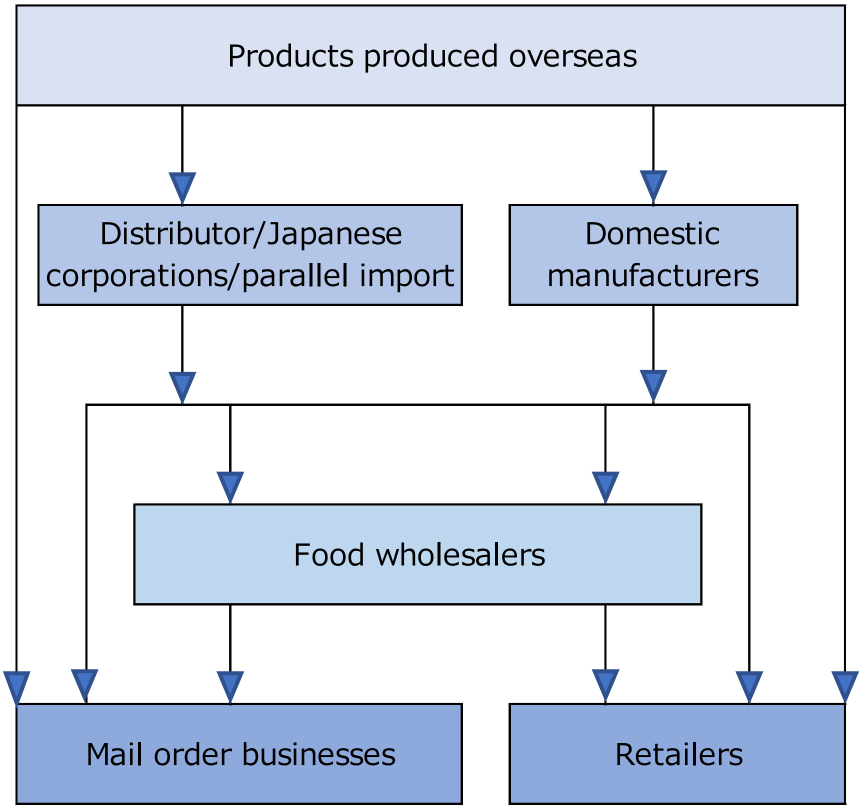
- The soup and concentrated dashi market in Japan has been stable, with the market size reaching $1,039,087 thousand USD for FY2023 (up 0.5% YoY). The market is projected to reach $1,061,929 thousand USD by FY2027, with CAGR from FY2018 to FY2027 expecting 0.2%.

- Top two brands occupying the consommé and bouillon market in Japan are Ajinomoto Co., Inc., a major domestic manufacturer, and Nestle Japan Limited, Nestle's Japanese subsidiary. To fuel demand for home-use products, proactive sales promotions take place, such as recipe suggestions at websites and some flavoring products displayed nearby the related merchandise at supermarkets, etc. Business-use products have steadfast demand, as consommé and bouillon work to stabilize the taste for the dishes to offer and reduce cooking time, as restaurants suffer from serious manpower shortage.

- As many of "dashi" or flavoring products are used for cooking Japanese dishes, the market is mostly occupied by domestic manufacturers. The market has been formed because of the products' convenience and handiness in bringing depth in flavor only by putting into the pot, when compared to the traditional way of taking dashi or stock starting from shaving the dried bonitos that are then simmered or by leaving dried sardines in water for hours. However, increased single households or households with a few members has reduced cooking frequencies and has led to a market shrinkage. Still, business-use products have strong demand, being proactively used in dishes offered at restaurants and in ready-to-eat foods. In recent years, higher health consciousness has raised demand for products with reduced salt.

- The instant and cup soups market has a variety of products, from powdered soup in a package per meal, miso soup freeze dried with vegetables, in a paper cup to pour hot water in, to those pouched for ready to eat, etc. The market has been stable, supported by consumers who want to omit labor or save time for cooking. Not to mention breakfast at home and lunch at the office, where cup soups and instant soups are often consumed, their use at dinnertime is increasing, as they can be an additional dish with various ingredients when the meal is somewhat poor. The market launch of weight-loss products, such as low-calory or low-carbo products, those products with oatmeal or some assortment of grains contained for meal replacement, is increasing. Some pouched products that can directly microwave have also been generalized.

DISTRIBUTION, SALES CHANNEL

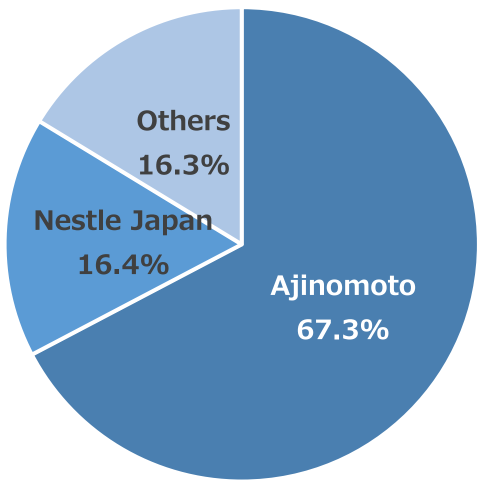


- Imported products are available at imported food stores or at mail order businesses, sold through distributors and as parallel imports.
- Some major overseas brands have established Japanese subsidiaries to manufacture products in Japan.

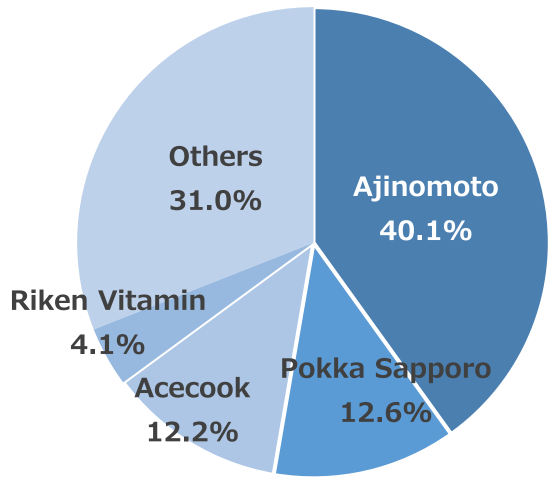
POSITIONING OF DOMESTIC PRODUCTS AND IMPORTED PRODUCTS

- As "dashi" or flavoring products are mostly used when cooking Japanese dishes, most are offered by Japanese manufacturers. Without any imported products generally distributed, the market shares of consommé/bouillon, and instant/cup soups by company are as follows.

Consommé, bouillon



Instant/cup soups



(Estimated by Yano Research Institute)

- As an overall trend, the market has few products manufactured overseas and is occupied by domestic products. It is because well-known overseas brand products such as Maggi are produced in Japan, and other overseas products often available at imported food stores are not so many in quantity.

- For the market share of consommé and bouillon by company, Nestle Japan is positioned at the second place, the Japanese subsidiary of Nestle that is headquartered in Switzerland. It develops the “Maggi" brand, with both domestically manufactured products and overseas products imported seemingly available, depending on the merchandise.

- For instant or cup soups, large shares are occupied by domestic manufacturers. Ajinomoto, with the largest share, not only offers its original “Ajinomoto KK Consommé” series, but also manufactures and distributes "Knorr" brand soups owned by a German company.

- Campbell’s soups, originated by a company in the United States, are relatively well known in Japan, with concentrated canned soups available at some supermarkets and imported food stores. Those available in Japan are mostly partly labeled in Japanese characters on the can and are developed to suit the taste of Japanese people. They are manufactured overseas, imported by Campbell Japan Inc., the Japanese subsidiary, and distributed by Shimizu Shokuhin Kaisha, LTD., the exclusive distributor in Japan. Instant soup products by domestic manufacturers are mostly powdered and often packed in stick packages or in cups, unlike Cambell's pasted soups contained in cans.

CHARACTERISTICS OF MAJOR PRODUCTS & TOP-SELLING PRODUCTS

[Consommé and bouillon]

Manufacturer	Product name	Standard	Price (with tax) *
Ajinomoto Co., Inc.	Ajinomoto KK Consommé	21 cubes in box	$2.3 USD
Ingredients	Salt (manufactured in Japan), lactose, sugar, edible processed oils & fats, vegetable and meat extracts (Chinese cabbage extract, chicken extract, fermented yeast extract seasoning, beef extract, edible oils & fats), spices, vegetable extract, soy sauce, fructose, yeast extract/seasoning (amino acid, etc.,) processed starch, acidifier, (in part wheat, milk ingredients, beef, soybeans chicken are included.)		
Characteristics	Western-style soups are prepared immediately when cooked with meat and/or vegetables. Serves for two per cube (300 ml). A variety of recipes are available at the Japanese version of company website.		
Product image (Source: Company website)			

*Retail price at ecommerce site (www.yodobashi.com) as of 27 Sep. 2024

[Flavoring products]

Manufacturer	Product name	Standard	Price (with tax) *
Ajinomoto Co., Inc.	Hondashi®	packed by 40g package	$1.1 USD
Ingredients	Salt (manufactured in Japan), Sugar (sugar, lactose), flavor ingredients (dried bonito powder, bonito extract), yeast extract, fermented yeast extract seasoning/seasoning (amino acid, etc.)		
Characteristics	As it contains dried bonito, a small pinch of this product during the cooking process turns the meal into perfect Japanese cuisine and can be used in various Japanese dishes. Granule type to prevent moist.		
Product image (Source: Company website)			

*Retail price at ecommerce site (www.yodobashi.com) as of 27 Sep. 2024

[Instant/cup soups]

Manufacturer	Product name	Standard	Price (with tax) *
Ajinomoto Co., Inc.	"Knorr Cup Soup", Corn Cream	8 packages	$3.2 USD
Ingredients	Sweetcorn (United States of Japan), sugar, starch, creaming powder, dextrin, edible processed oil and fats, salt, milk powder, onion, fructose, potato, corn butter powder, corn processed product, Butter-sauteed onion powder, concentrated whey, milk protein, chicken extract, yeast extract, spices, croutons/seasoning (amino acids, etc.,) leavening agent (in part contains wheat, milk ingredients, beef, soybeans or chicken.)		
Characteristics	Consumers can choose from a variety of flavors.		
Product image (Source: Company website)			

*Retail price at ecommerce site (www.yodobashi.com) as of 27 Sep. 2024

MAJOR IMPORTERS

- Well-known overseas brands such as “Maggi” and “Campbell’s” are imported by Japanese subsidiaries. Other products from overseas are available at imported food stores and mail order businesses via distributors or parallel importers.

Company name	Location	Description	URL
MUSO CO., LTD.	MUSO BLDG, 1-3-8 Minamishinmachi, Chuo-ku, Osaka City	Importing and wholesaling of organic food and ingredients	https://www.muso-intl.co.jp/ HOME - MUSO CO., LTD. (muso-intl.com)
Matsuya	2-2-23, Tateba Naniwa-ku Osaka-City	Development, manufacturing, sales of western foods and ingredients	http://www.mw-matsuya.co.jp/
DOVERFIELD FAR EAST LTD.	8F, Omori NS Bldg., 3-1-14 Omorikita, Ota-ku, Tokyo	Importing & exporting, and domestic sale of agricultural and fishery products, as well as processed products of such ingredients, condiments, and spices.	https://doverfield.co.jp/
Daiei Trading Co., Ltd.	Daini Udagawa Bldg., 3-9, Kanda Jinbocho, Chiyoda-ku, Tokyo	Importing and sale of Chinese ingredients and condiments	https://daieitc.co.jp/
YUSEI TRADING LTD.	2 F& 3 F, Yusei Bldg., 2-31-1, Otamachi Yokohama Naka-ku	Importing and domestic sale of foods and liquors	https://www.eyusei.com/
Chuka Takahashi INC.	4-7-18, Miyoshi, Koto-ku, Tokyo	Processing and sale of business-use Chinese ingredients including shark fins.	https://www.chutaka.co.jp/

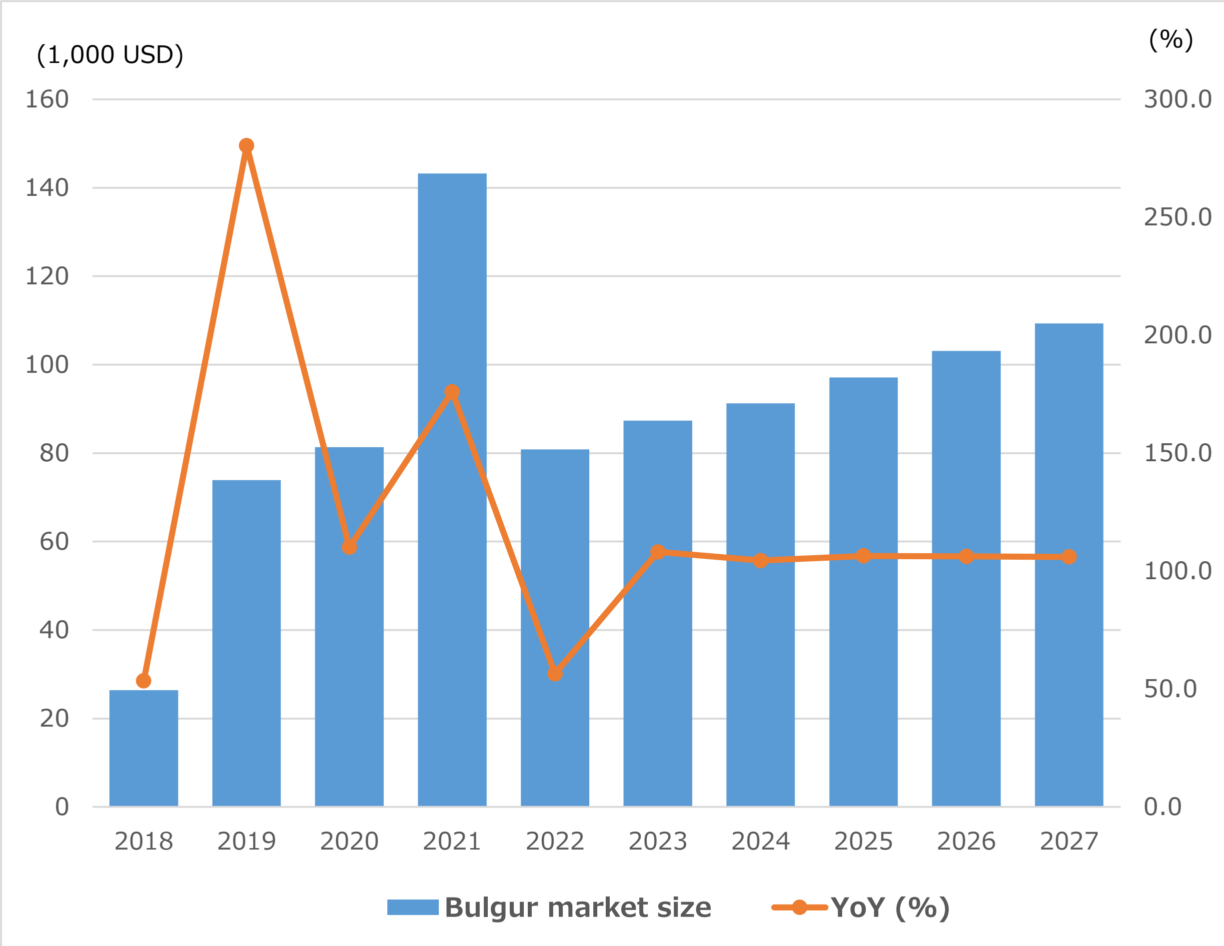
11. Bulgur and Cooked Bulgur Pilaf

Key points of the market trend and characteristics

- **As the awareness of bulgur is quite low in Japan, the market is very small.**
- **Bulgur is available at a major imported food store chain, and a supermarket chain that deals in business-use ingredients.**
- **To disseminate foreign food culture in Japan, it is effective to ask help from the food service industry to provide tasting opportunities. Bulgur menus at restaurants and other food service businesses are expected to increase the awareness of bulgur.**
- **First, business should be started with Turkish food traders, or some trading firms or wholesalers that have ties with imported food retailers, and, in parallel with that, some sales promotion or marketing activities are needed to spread bulgur.**

Market Size

MARKET SIZE TRANSITION AND FORECAST (BY VALUE, FY2018 TO FY2027)



	Fiscal year										CAGR
(1,000 USD)	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2018-2027
Bulgur market size	26	74	81	143	81	87	91	97	103	109	17.1%
YoY (%)	53.5	280.4	110.1	176.0	56.4	108.1	104.5	106.4	106.2	106.0	

***Figure for FY2023 is the projection, and for FY2024 is the forecast.**
(Estimated by Yano Research Institute)

- As bulgur is not very known in Japan, the market is very small, with the market size for FY2023 estimated at **$87 thousand USD.**
- FY2021 saw people spending more time at home due to behavior restrictions amid the COVID-19 pandemic, which seemed to have increased the import volume of bulgur, backed by increased demand for home-use processed foods.
- After temporary increase and decrease in import volume, the bulgur market in Japan is projected to be on the rise in the long run, as the awareness improves and the eating opportunity increases.

Total import size by country (for HS-code 1904.30,1904.90, FY2018 to FY2023, value & volume)

《Import value transition》

FY2023	(1,000 USD)	Fiscal year						CAGR
Ranking	Country name	2018	2019	2020	2021	2022	2023	2018-2023
1	China	1,093.3	1,191.0	1,309.7	1,449.3	1,844.8	1,595.2	7.8%
2	South Korea	50.6	71.9	142.6	416.5	727.2	1,309.2	91.7%
3	Thailand	677.8	726.9	754.7	663.6	657.7	816.6	3.8%
4	Italy	249.9	223.1	1,683.9	219.7	322.7	615.9	19.8%
5	Taiwan	227.9	237.7	421.6	379.1	633.7	313.5	6.6%
6	United States	207.4	136.0	74.7	123.0	44.9	293.4	7.2%
7	Türkiye	9.7	18.0	28.1	71.8	183.9	215.1	85.8%
8	Vietnam	45.0	38.7	39.6	40.4	64.1	62.1	6.7%
9	Australia	0.0	0.0	0.0	0.0	99.1	47.6	-
10	India	3.5	11.8	16.5	36.9	45.4	47.6	68.4%
	Other	133.8	86.2	278.7	133.8	127.8	134.4	0.1%
	Total	2,698.8	2,741.4	4,750.2	3,534.0	4,751.3	5,450.5	15.1%
	YoY (%)	106.3	101.6	173.3	74.4	134.4	114.7	

*Cumulative total, from April to March
*Share of top 10 countries: 97.5% (2023)

《Import volume transition》

FY2023	(Unit: ton)	Fiscal year						CAGR
Ranking	Country name	2018	2019	2020	2021	2022	2023	2018-2023
1	China	892	1,002	970	879	1,005	780	-2.7%
2	Thailand	686	782	759	715	567	631	-1.7%
3	South Korea	16	15	49	148	233	401	89.5%
4	Taiwan	188	187	396	288	406	211	2.3%
5	Italy	135	105	436	82	110	129	-0.9%
6	Türkiye	17	30	59	72	86	102	43.2%
7	United States	101	68	54	77	20	85	-3.3%
8	Australia	0	0	0	0	8	82	-
9	India	1	3	14	28	26	41	108.0%
10	Vietnam	13	10	23	26	33	31	19.7%
	Other	42	33	100	62	47	41	-0.2%
	Total	2,091	2,235	2,860	2,377	2,542	2,535	3.9%
	YoY(%)	104.3	106.9	128.0	83.1	106.9	99.7	

*Cumulative total, from April to March
*Share of top 10 countries: 98.4% (2023)

《Unit price transition》

	Fiscal year						CAGR
	2018	2019	2020	2021	2022	2023	2018-2023
Unit price (US$/kg)	**1.29**	**1.23**	**1.66**	**1.49**	**1.87**	**2.15**	**10.7%**
Year-on-Year (%)	**101.9**	**95.1**	**135.4**	**89.5**	**125.8**	**115.0**	

- As HS Code 1904.90 includes items that contain rice, the staple food for Japanese people, those countries with the same rice consuming culture such as China, South Korea and Thailand are at the upper rankings for import value and volume.
- According to the above actual performance, Türkiye, as an importing country for Japan, is positioned at the seventh by value (**$215.1 thousand USD**) and the sixth by volume (102t).
- The import value has been on the rise since FY2022, affected by weakened yen and increased transportation costs.

Key Information for Exporting to Japan

TARIFFS (HS CODE-BASED: 1904.30,1904.90)

*General or Temporary rate shall be applied unless a specific tariff rate is shown in the tables below.

Statistical code		Description	Tariff rate						
H.S. code			Türkiye	General	Temporary	ASEAN	CPTPP	EU	US
19.04		Prepared foods obtained by the swelling or roasting of cereals or cereal products (for example, corn flakes); cereals (other than maize (corn)) in grain form or in the form of flakes or other worked grains (except flour, groats and meal), pre-cooked, or otherwise prepared, not elsewhere specified or included							
1904.30		Bulgur wheat	100yen/kg	(100 yen/kg)					
	010	- Imported by Japanese Government according to Article 42 of "The Law for Stabilization of Supply-Demand and Price of Staple Food", imported to be purchased and sold by Japanese Government in response to a joint application by seller to and purchaser from Japanese Government according to Article 43 of the Law or imported with certification of Minister of Agriculture, Forestry and Fishery according to the cabinet order concerning wheat and others provided by the cabinet order provided in column 3 of paragraph 1 of Article 45 of the law	25%		25%		For the tariff rate quota in Japan's Schedule to the WTO Agreement 25% Other Free	Other than for the tariff rate quota in Japan's Schedule to the WTO Agreement Free	
	090	- Other	26.20 yen/kg		26.20 yen/kg		26.20 yen/kg		
1904.90		Other							
		1 Of rice	402 yen/kg	(402 yen/kg)					
	110	*〔1〕Containing not more than 30% by weight of rice	25%		25%		23.7%		
		*〔2〕Other							

Statistical code		Description	Tariff rate						
H.S. code			Türkiye	General	Temporary	ASEAN	CPTPP	EU	US
	120	- Imported by Japanese Government according to Article 30 of "The Law for Stabilization of Supply-Demand and Price of Staple Food", imported to be purchased and sold by Japanese Government in response to a joint application by seller to and purchaser from Japanese Government according to Article 31 of the Law, imported with certification of Minister of Agriculture, Forestry and Fishery according to the cabinet order concerning rice and others provided by the cabinet order provided in column 3 of paragraph 1 of Article 34 of the law	25%		25%		For the tariff rate quota in Japan's Schedule to the WTO Agreement 25% Other (Treatment for Australia) Free		
	130	- Other	49 yen/kg		49 yen/kg		49 yen/kg		
		2 Of wheat and triticale	100 yen/kg	(100 yen/kg)					
	210	- Imported by Japanese Government according to Article 42 of "The Law for Stabilization of Supply-Demand and Price of Staple Food", imported to be purchased and sold by Japanese Government in response to a joint application by seller to and purchaser from Japanese Government according to Article 43 of the Law or imported with certification of Minister of Agriculture, Forestry and Fishery according to the cabinet order concerning wheat and others provided by the cabinet order provided in column 3 of paragraph 1 of Article 45 of the law	25%		25%		For the tariff rate quota in Japan's Schedule to the WTO Agreement 25% Other Free	Other than for the tariff rate quota in Japan's Schedule to the WTO Agreement Free	
	290	- Other	26.20 yen/kg		26.20 yen/kg		26.20 yen/kg		

Statistical code		Description	Tariff rate						
H.S. code			Türkiye	General	Temporary	ASEAN	CPTPP	EU	US
		3 Of barley		(75 yen/kg)					
	310	- Imported by Japanese Government according to Article 42 of "The Law for Stabilization of Supply-Demand and Price of Staple Food", imported to be purchased and sold by Japanese Government in response to a joint application by seller to and purchaser from Japanese Government according to Article 43 of the Law or imported with certification of Minister of Agriculture, Forestry and Fishery according to the cabinet order concerning wheat and others provided by the cabinet order provided in column 3 of paragraph 1 of Article 45 of the law	25%		25%		For the tariff rate quota in Japan's Schedule to the WTO Agreement 25% Other Free	Other than for the tariff rate quota in Japan's Schedule to the WTO Agreement Free	
	390	- Other	26.60 yen/kg		26.60 yen/kg		26.60 yen/kg		
	400	4 Other	21.3%	25%			5.3%		

RELATED LEGAL SYSTEMS, REGULATIONS

Food Sanitation Act (https://www.mhlw.go.jp/stf/seisakunitsuite/bunya/0000144562.html)

Main items	Regulatory authority	Regulations when importing
Food (confectionery, beverages, etc.) water, food additives, supplements, etc.	Ministry of Health, Labour and Welfare (MHLW)	Notification must be made to MHLW

《Outline》

- **The Food Sanitation Act aims to prevent sanitation hazards resulting from eating and drinking and to ensure food safety thereby protecting citizens' health. The Act also applies to imported foods.**
- **A person who intends to import food, etc. for the purpose of sale or to use in business is obliged to make an import notification from this perspective to ensure food safety, based on Article 27 of the Food Sanitation Act.**
- **Notifications are accepted at the quarantine station, where a food sanitation inspector examines the foods and products to confirm their compliance with the criteria and standards of the Food Sanitation Act, and the necessity of an inspection. (A consultation service is available.)**

《Notification procedures》

(1) Preparing for documents needed for the notification:
- ◆ Notification Form for Importation of Foods, etc.
- ◆ Other documents
  - · Description of raw materials and manufacturing processes (processed foods, etc., as required)
  - · Health (sanitary) certificate (as required)
  - · Test results (as required)

(2) Submit the completed Notification Form and other documentation to the quarantine station responsible for the port of import.

(3) The notification form and other documentation submitted are examined by a food sanitation inspector based on legislation to determine the necessity of inspections.

(4) When the document examination and cargo inspection have found that the cargo conforms to the act (the cargo "passed" the inspection), a "Certificate of Notification" will be returned to the importer from the MHLW quarantine station where the notification was first submitted.

《Recent amendments to Food Sanitation Act》

· To secure food safety against changes in environment surrounding food and food internationalization, the Food Sanitation Act has been amended in 2019 as follows:

(1) Reinforcement of wide-area food poisoning incident response

(2) Institutionalization of sanitation control in compliance with HACCP

(3) Obligation to notify health damage incident caused by intake of their food products containing the designated ingredients or components

(4) Introducing a positive list system for food containers and packaging
Reference of lists:
https://www.mhlw.go.jp/content/11130500/000638983.xlsm
https://www.mhlw.go.jp/content/11130500/000635356.xlsx

(5) Revision of licensing system and establishment of notification system for food business

(6) Obligation to notify food recall information to the government

(7) Further enhancement of import and export food safety certification:
For the purpose to confirm that the inspections and control have properly been conducted in the exporting countries for insurance of safety of imported foods, sanitation control based on HACCP and attachment of sanitation certificates of dairy products or aquatic food are required as a requisite of import.

《Other key points to notify》

Food additives and pesticide residues are also regulated by the Food Sanitation Act. Since there are often publicized cases of violations of food additives and pesticide residues in imported foods, a positive list is provided here.

Food additives

- Food additives such as preservatives, sweeteners, colorants, and flavoring agents used in the process of food production or for the purpose of food processing and preservation are also regulated under the Food Sanitation Act. MHLW allows the use of food additives only when they have been judged by the Food Safety Commission as not inflicting any risks on human health, and only after specifying standards for ingredients and criteria for their use. MHLW also strives to ensure the safety of food additives that have been approved for use by, for example, surveying the per capita intake of food additives. See below for the positive list of food additives.

Excel https://www.mhlw.go.jp/content/001031538.xlsx

Pesticide residue

- To ensure that pesticide remained in food not to inflict on human health, MHLW sets the residue standards for all agricultural chemicals, feed additives, and animal drugs. The residue standards are set by the Food Safety Commission for each food within the range of amount not harmful to intake. Any foods with agricultural chemicals, etc. remained at the level surpassing the standard are banned for sale or import by the Food Sanitation Act.
- To ensure that pesticide residues do not exceed standards, the Ministry of Agriculture, Forestry and Fisheries (MAFF) sets the usage standard based on the Agricultural Chemicals Regulation Act. When foods are being imported, they are inspected for pesticide residues at the quarantine station.

For the search on pesticide residue standard values: https://db.ffcr.or.jp/front/

Food Labeling Act（https://www.caa.go.jp/en/policy/food_labeling/）

Main items	Regulatory authority	Measures to take
All food items sold for consumers, etc.	Consumer Affairs Agency	Labeling on container packages in Japanese language

《Labeling details》

- Following nine items are needed to be labeled for foods sold to consumers:

Items to label	Descriptions
1. General name	Indicate common name that expresses the process food contents. Some names such as “mayonnaise” “ketchup” need to meet certain requirements.
2. Storage condition	Storage condition of the product before opening the package should be indicated in accordance with the characteristics of the food, such as “Store at room temperature out of direct sunlight”, “Store at 10°C or below”, etc.
3. Use by date or Best before date	Label “use by date” for foods that are quick to deteriorate in quality, while label “best before date” for all other foods.
4. Ingredients used	· Indicate the most common name of raw materials used, in descending order of percentage by weight. · For composite materials that comprise two or more of raw materials, list all materials in descending order of percentage by weight within the parentheses after the composite material name.
5. Additives	Indicate the name of substance for additives, in descending order of percentage by weight, except for those used for nutritious enhancement, processing aids, or those that can be applied to the “carry-over” principle.
6. Content or solid volume and total content	Indicate content weight, content volume, or content quantity. Content weight should be labeled in grams or kilograms, content volume in milliliters or liters, and content quantity in units such as number of pieces.
7. Amount and calorific value of nutrients	For consumer processed foods, calories, amount of protein, fat, carbohydrate, and sodium should be indicated.
8. Name and address of food business operator	Of food business operators, indicate the name and address of the person who is responsible for food labeling descriptions.
9. Location of manufacturing or processing plant and name of manufacturer or processor, etc.	Indicate the location of manufacturing or processing plant and the name of manufacturer or processer. For imported products, indicate the location of the importer’s office and the name of the importer.

- In addition to the above, some items need to be indicated if certain requirements are met. The following two items need particular notice.

Items to indicate	Descriptions
Allergen	· Allergen labeling is mandatory for processed foods made from specified raw materials and foods containing additives derived from specified raw materials. · Allergen labeling is recommended for processed foods made from ingredients equivalent to specified raw materials. **Mandatory to label - Specific 8 ingredients:** Shrimp, crab, walnut, wheat, soba (buckwheat), eggs, milk, peanut **Recommended to label – 20 ingredients equivalent to specified raw materials:** Almond, abalone, squid, salmon roe, orange, cashew nut, kiwi fruit, beef, sesame, salmon, mackerel, soybean, chicken, banana, pork, macadamia nut, peach, yam, apples, gelatin
Country of origin	For imported products, name of the country of origin should be indicated.

(Source: "An Introduction of Rule in Japan "Food Labeling Guide" - Aiming for Food Safety and Reliability" by Food Labeling Certification Association, Consumer Affairs Agency)

Market Information

MARKET TRENDS IN RECENT YEARS

- In Japan, bulgur is available at two store chains. One is an imported food store chain "KALDI COFFEE FARM" operated by CAMEL COFFEE Co., Ltd. Another is "Gyomu Super" a supermarket that has been on the rise with the concept of being grocery store for businesses, while attracting also household demand, operated by KOBE BUSSAN CO., LTD.
- In Japan, restaurants and other food service businesses often contribute to improve awareness and encourage consumption of foods from overseas. Proactive adoption of bulgur in menus at Turkish restaurants despite smaller in number of restaurants than those of Italian, French, Korean, Chinese, or Other Asian cuisines, and bulgur menu development at restaurants in hotels or family restaurants that have various menu from around the world may be able to stimulate demand.

DISTRIBUTION, SALES CHANNEL

- OVERSEAS CO., LTD. is the importer for an imported food store chain "KALDI COFFEE FARM", while KOBE BUSSAN CO., LTD., operates as well as imports for "Gyomu Super."
- There are some cases of bulgur sold by mail order businesses that sell imported goods.

POSITIONING OF DOMESTIC PRODUCTS AND IMPORTED PRODUCTS

- As it seems to be no bulgur merchandise produced in Japan, bulgur products are imported from overseas centered on Türkiye. Couscous, with similar looks and applications, is available as wheat processed food has more accessibility than bulgur. The country of origin for those couscous products sold at KALDI COFFEE FARM is Canada, developing whole wheat products.
- For couscous, Japanese major food manufacturers share couscous recipes, but it cannot be said that couscous is well known and eating habit of it widespread among Japanese people.
- Wheat flour is popularly used in Japan, mainly as the ingredient of staple foods such as noodles and bread. On the other hand, rice has long been the staple food for Japan since the ancient times. Therefore, there are various kinds of cooked rice recipes nationwide. Pilaf is one of familiar rice recipes that came from overseas, and has its frozen products developed.
- For Japanese people, pilaf is one of rice menus. In many cases, bulgur pilaf has an appeal for its different texture from rice pilaf.
- In Japan, wheat is mostly imported, with domestically produced wheat occupying smaller percentage. For processed foods using wheat flour, however, both domestic flour and/or that from overseas are frequently used. Rice is predominantly produced domestically, so are rice processed foods.

CHARACTERISTICS OF MAJOR PRODUCTS & TOP-SELLING PRODUCTS

- Bulgur pilaf products available at KALDI COFFEE FARM and Gyomu Super appeal their convenience of using microwave for preparation.

Company name	Product name	Price (with tax) *	Product image
KALDI COFFEE FARM	DURU Finely cracked bulgur 500g	**$1.99 USD**	
KALDI COFFEE FARM	DURU Course bulgur 500g	**$1.99 USD**	
KALDI COFFEE FARM	DURU Kisir (Bulgur salad) 250g	**$2.12 USD** (Discount price)	
KALDI COFFEE FARM	DURU Sebzeli Bulgur Pilavi (Bulgur pilaf with vegetables) 250g	**$2.12 USD** (Discount price)	
Gyomu Super	Bulghur Pilaff 250g	**$1.31 USD**	

MAJOR IMPORTERS

- As the market of bulgur in Japan is still tiny, awareness improvement and dissemination activities to Japanese population are required, making it too early for major Japanese food traders to proactively involve in bulgur dealings at this time. First, it is important to start business with Turkish food traders, or some trading firms or wholesalers that have ties with imported food retailers, and, in parallel with that, some sales promotion or marketing activities are needed to spread bulgur.

Turkish Product Importers

Company name	Location	Company outline	URL
Tugba Trading CO., LTD.	4-20-40, Yahara, Nerima-ku, Tokyo	Importer of Turkish products. Develops restaurants in Japan.	https://tugba.co.jp/jp/
Marre Co., Ltd.	6F, Kisuke Nishishinbashi Bldg., 2-19-4 Nishishinbashi, Minato-ku, Tokyo	Importer of food ingredients, that has started from Turkish foods. Currently, manufactures foods, too (i.e., Halal food manufacturing, dried fruit repacking).	https://www.marre.co.jp/

Importers of retailers handling bulgur

Company name	Location	Company outline	URL
OVERSEAS CO., LTD.	5-11-10, Daita, Setagaya-ku, Tokyo	Partner company with KALDI COFFEE FARM, an imported food store chain.	https://overseas-inc.jp/
KOBE BUSSAN CO., LTD.	125-1 Hirano, Kakogawa-cho, Kakogawa-shi, Hyogo	Operator of Gyomu Super, a retail store chain. Involves in merchandise development overseas and import them by itself.	https://www.marre.co.jp/

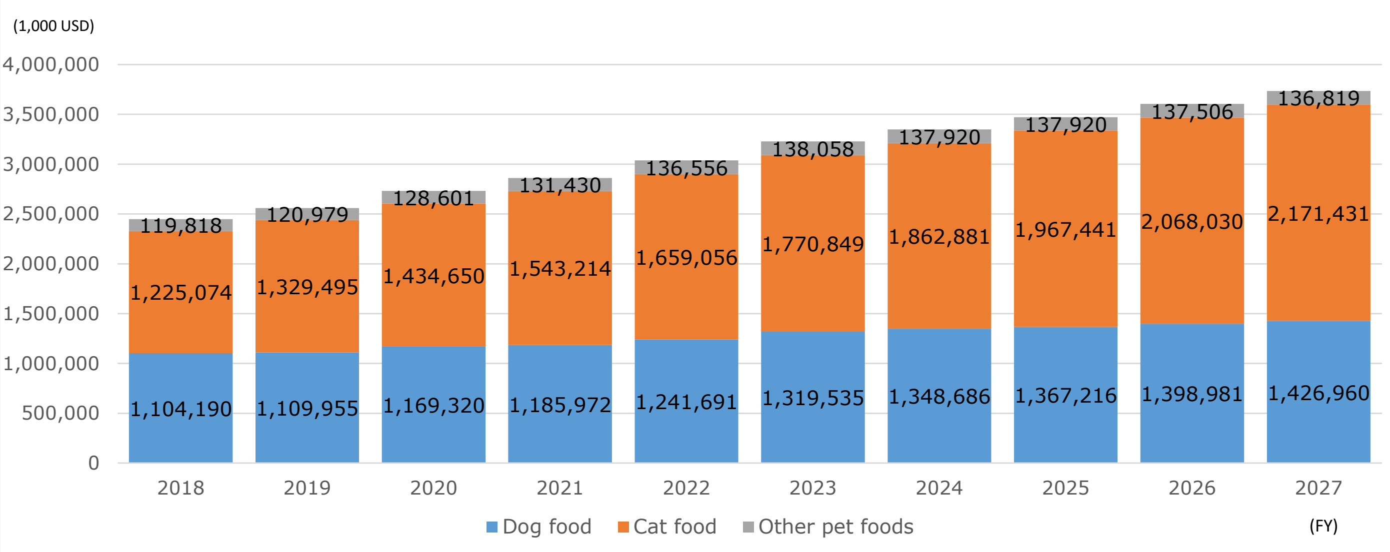
12. Pet Food

Key points of the market trend and characteristics

- **In Japan, the majority of dogs owned by general household is small in size, and cats are mostly kept indoor. With increased longevity of pets, consumers have become more conscious about the health of pets, and demand for products and services that respond to expanded recognition of pets as companion animals has been in an upward trend.**
- **The pet food market in Japan has been decreasing in volume but increasing in value. The development of high-priced products such as pet foods that better meet preference and taste of pets, and those for better health of pets contributed to the market expansion in value.**
- **Against the backdrop of increase in indoor pets, cat foods sales marked a significant increase. Further, snacks (or pet treats) have shown steady growth as they are frequently used as communication tools with pets.**
- **Some of the well-established foreign pet food brands in the Japanese market include MARS headquartered in the United States and ROYAL CANIN from France, both of which have developed business in Japan from long time ago and have successfully secured large market shares in the Japanese pet food market.**
- **Many pet foods sold in Japan are made in overseas countries. While dry foods imported to Japan are mostly repacked in Japan, imported wet foods are already in the final packages. Either repacking in Japan or importing products in the final packages apply to many pet snack products. In both cases, appropriate labeling specifically for the Japanese market is required.**
- **To successfully export pet foods to Japan, it is essential to have a local affiliated company that works as the importer or to secure reliable sales agencies in Japan.**
- **In large, there are two major sales channels in Japan, the sales through physical retail stores and those through mail-order businesses. In recent years, mail-order sales have been sharply expanding. As to the retail channels, there are two major types of sales routes. The one is mainly for high-priced products where demonstration sales are conducted, and the other is mainly for low-priced products where the products are sold by the self-service method.**

Market Size

MARKET SIZE TRANSITION AND FORECAST (BY VALUE, FY2018 TO FY2027)



(1,000 USD)		Fiscal year										CAGR
		2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2018-2027
Total		2,449,082	2,560,430	2,732,572	2,860,616	3,037,304	3,228,443	3,349,488	3,472,577	3,604,517	3,735,211	4.8%
	year on year	103.9	104.5	106.7	104.7	106.2	106.3	103.7	103.7	103.8	103.6	
Dog food		1,104,190	1,109,955	1,169,320	1,185,972	1,241,691	1,319,535	1,348,686	1,367,216	1,398,981	1,426,960	2.9%
	year on year	100.9	100.5	105.3	101.4	104.7	106.3	102.2	101.4	102.3	102.0	
Cat food		1,225,074	1,329,495	1,434,650	1,543,214	1,659,056	1,770,849	1,862,881	1,967,441	2,068,030	2,171,431	6.6%
	year on year	107.2	108.5	107.9	107.6	107.5	106.7	105.2	105.6	105.1	105.0	
Other pet foods		119,818	120,979	128,601	131,430	136,556	138,058	137,920	137,920	137,506	136,819	1.5%
	year on year	100.6	101.0	106.3	102.2	103.9	101.1	99.9	100.0	99.7	99.5	

*The figures for 2023 are projections, and those for 2024 and onward are forecast.
(Estimated by Yano Research Institute Ltd.)

- The Japanese pet food market is on an upward trend, and the market size reached **$3,228,443 thousand USD** (6.3% increase year-on-year) in 2023. It is forecasted that the market will further expand to **$3.7 billion USD** in 2027, and the CAGR (compound annual growth rate) between 2018 and 2027 will be 4.8%.
- The major factor that explains the increasing market size in monetary value is the raised average unit price of pet foods despite no obvious changes in the number of pets (or dogs and cats) owned.
- The market size in value increased also because of the extensive product price hike forced by the cost increase stemmed from the higher import price of pet foods and the raised price of import raw materials that boosted production costs of domestic pet foods that occurred as a result of the trend of yen depreciation continued from around 2022.
- Though it is anticipated that no big changes in the number of pets owned will be seen in Japan in coming years, the pet food market in value could further grow as the demand for the high-priced pet foods with improved food preferences and health functions is expected to expand on the background of improved awareness of pets as companion animals and growing consciousness about pets’ health and longevity due to the aging of pets.

TOTAL IMPORT SIZE AND IMPORT SIZE BY COUNTRY (CN CODE-BASED, FY2018 TO FY2023, VALUE & VOLUME)

《Import value transition》

FY2023	(1,000 USD)	Fiscal Year						CAGR
Ranking	Country	2018	2019	2020	2021	2022	2023	2018-2023
1	Thailand	227,858	224,192	242,432	260,479	316,428	347,213	8.8%
2	U.S.A.	149,353	155,112	140,849	157,549	195,869	181,943	4.0%
3	China	101,480	91,699	103,955	115,735	140,783	139,718	6.6%
4	France	80,355	71,769	87,074	85,657	82,669	82,085	0.4%
5	South Korea	8,560	21,362	18,218	29,228	72,490	75,675	54.6%
6	Australia	45,386	38,532	43,000	46,966	69,676	68,758	8.7%
7	Netherlands	38,868	40,734	45,523	40,664	53,852	51,162	5.7%
8	Czechia	40,125	38,508	32,564	34,795	43,009	44,594	2.1%
9	Canada	21,804	16,590	15,721	18,224	24,254	28,666	5.6%
10	UK	17,326	15,080	15,504	16,644	21,115	25,149	7.7%
11	Italy	6,205	6,421	9,689	10,433	15,431	18,053	23.8%
12	New Zealand	9,590	10,733	12,785	18,859	19,060	11,507	3.7%
13	Germany	19,515	14,023	13,506	15,717	12,232	10,277	-12.0%
14	Denmark	7,759	8,462	9,803	8,767	10,600	10,001	5.2%
15	Austria	5,641	7,782	6,731	8,824	14,858	9,705	11.5%
16	Vietnam	6,865	7,297	7,808	7,232	10,780	8,058	3.3%
17	Poland	8,808	12,265	2,991	7,679	8,202	7,166	-4.0%
18	Ireland	2,711	3,084	2,943	3,848	4,386	5,322	14.4%
19	Indonesia	3,025	3,112	3,467	4,257	5,767	5,319	11.9%
20	Taiwan	3,796	2,679	3,160	3,355	4,319	5,306	6.9%
48	Türkiye	0.00	17.43	14.58	13.51	16.68	21.77	829.90%
	Others	20,473	21,909	23,402	21,879	29,503	20,718	0.2%
	Total	825,502	811,362	841,138	916,805	1,155,298	1,156,417	7.0%
	Y-o-Y（%）	10,488.7	98.3	103.7	109.0	126.0	100.1	

*Cumulative total, from April to March

*Share of top 20 countries：98.2%（2023）

*Actual import from Türkiye：$21.77 thousand USD, share 0.0%, ranks 48th（2023）

- Production of wet foods (canned foods and foods in retort pouch) mainly made of fish is high in Thailand, and many pet food manufacturers in Japan import products from Thailand.
- Value of imports by MARS with its headquarters in the U.S. and ROYAL CANIN from France who have been operating in Japan for years is so large that the U.S. and France are ranked high as exporting countries. Because ROYAL CANIN established a plant in South Korea where

products for Japan are made, the import value from Korea has been increasing in recent years.

- China is also ranked high as such snacks as jerky and plant-made treats are produced in large amount in the country.

《Import volume transition》

FY2023 Ranking	(Unit: ton) Country	2018	2019	2020	2021	2022	2023	CAGR 2018-2023
1	China	8,661,961	8,328,827	9,012,354	8,677,950	8,868,844	8,477,498	-0.4%
2	U.S.A.	11,563,751	11,238,872	10,053,781	10,582,321	8,503,355	7,580,195	-8.1%
3	Spain	1,939,078	2,082,505	2,039,112	1,417,245	1,268,846	1,140,943	-10.1%
4	Denmark	1,349,704	1,581,206	813,432	654,377	853,212	842,591	-9.0%
5	Thailand	698,128	684,012	705,411	529,104	593,725	633,821	-1.9%
6	France	547,907	587,268	723,236	612,625	672,966	603,579	2.0%
7	UK	604,367	583,972	574,726	469,554	514,211	492,056	-4.0%
8	Singapore	697,160	681,979	751,701	447,179	376,268	449,758	-8.4%
9	Bulgaria	5,070	101,362	371,450	306,902	473,350	410,000	140.7%
10	Italy	647,706	539,521	544,161	469,706	301,464	367,268	-10.7%
11	Belgium	337,979	331,411	337,905	322,458	270,100	267,463	-4.6%
12	Canada	594,055	613,367	296,331	181,785	227,405	251,247	-15.8%
13	South Korea	149,506	234,935	177,088	229,264	230,260	240,836	10.0%
14	Taiwan	350,545	114,852	230,000	187,122	242,315	240,190	-7.3%
15	Vietnam	276,634	314,283	264,107	300,837	303,929	207,386	-5.6%
16	Germany	71,896	53,690	87,595	65,003	127,971	168,655	18.6%
17	Switzerland	81,285	154,995	136,617	132,236	136,274	132,860	10.3%
18	Australia	129,023	132,221	113,285	135,261	113,793	124,592	-0.7%
19	India	129,003	160,645	61,144	165,663	71,394	119,391	-1.5%
20	Croatia	137,400	126,000	167,400	150,000	135,000	111,900	-4.0%
45	Türkiye	0	4	14	13	10	8	-
	Others	773,866	902,255	1,047,192	1,135,661	666,582	597,967	-5.0%
	Total	29,746,024	29,548,178	28,508,028	27,172,253	24,951,264	23,460,196	-4.6%
	Y-o-Y (%)	97.8	99.3	96.5	95.3	91.8	94.0	

*Cumulative total, from April to March

*Share of top 20 countries: 97.5% (2023)

*Actual import from Türkiye: 8 t , share 0.0%, ranked 45th (2023)

《Unit price transition》

	2018	2019	2020	2021	2022	2023	CAGR 2018-2023
Unit price (US$/kg)	0.03	0.03	0.03	0.03	0.05	0.05	12.2%
Y-o-Y (%)	107.3	98.9	107.5	114.4	137.2	106.5	

- Import value is positive at a CAGR (FY 2018-2023) of 7.0%, while import volume is negative at a CAGR of 4.6%, and unit price (US$/kg) is positive at a CAGR of 12.2%.
- While there has been no significant increase or decrease in the number of pets owned in Japan, the volume of imported pet food products has been on a downward trend due to competition with domestically produced pet foods in Japan. On the other hand, the unit price of pet food products and the total import value have been rising due to the increasing pursuit of health functions and good taste resulting in the increase of high-functionality and high valued-added products on top of the increase of import unit value affected by the weak yen and cost increase in production and transportation.

Key Information for Exporting to Japan

TARIFFS (HS CODE-BASED): 2308, 2309)

*General or Temporary rate shall be applied unless a specific tariff rate is shown in the tables below.

Statistical code		Description	Tariff rate					
H.S.code			Türkiye	General	Temporary	ASEAN	CPTPP	US
23.08								
2308.00	000	Vegetable materials and vegetable waste, vegetable residues and by-products, whether or not in the form of pellets, of a kind used in animal feeding, not elsewhere specified or included	Free	Free		Free	Free	
23.09		Preparations of a kind used in animal feeding						
2309.10		Dog or cat food, put up for retail sale						
	010	1 Containing not less than 10% of lactose by weight	Per each kilogram, 59.50 yen plus 6 yen for every 1% exceeding 10% by weight of lactose contained	Per each kilogram, 70 yen plus 7 yen for every 1% exceeding 10% by weight of lactose contained		Free	Free	Free
		2 Other						
	091	1In airtight containers not more than 10kg each including container	Free	Free		Free	Free	
		2Other						
	092	A More than 70yen/kg in value for customs duty, excluding those containing 35% or more by weight of crude protein	Free	Free		Free	Free	

Statistical code H.S.code		Description	Tariff rate Türkiye	General	Temporary	ASEAN	CPTPP	US
		B Other						
	093	aIn powders, meals, flakes, pellets, cubes or similar forms, containing less than 5% by weight of sugars evaluated as sucrose, less than 20% by weight of free starch, less than 35% by weight of crude protein, other than those be separable 10% or more by weight of broken rice and flour or meal of rice taken together when determined by means of separating methods stipulated by a cabinet order	Free	Free		Free	Free	
	099	bOther	36 yen/kg	60 yen/kg		Free	Free	Free
2309.90		Other						
		1Preparations of a kind used in animal feeding, excluding those directly used as feed or fodder	3%	5%				
	110	- Vitamin preparations for				Free	Free	Free
	190	- Other				Free	Free	Free
		2 Other						
		1Containing not less than 10% of lactose by weight						
	211	A Intended for feeding	Free	Free		Free	Free	
	219	B Other	Per each kilogram, 52.50 yen plus 5.30 yen for every 1% exceeding	Per each kilogram, 70 yen plus 7 yen for every 1% exceeding		Free	Free	Free
		2Other						
		A Those with a basis of products specified in heading 12.14 or 23.03, in pellets, cubes or similar forms, alfalfa green leaf protein concentrates or fish marine mammal solubles	Free	Free				

Statistical code		Description	Tariff rate					
H.S.code			Türkiye	General	Temporary	ASEAN	CPTPP	US
	292	- Those with a basis of products specified in heading 12.14 or 23.03, in pellets, cubes or similar forms				Free	Free	
	291	- Alfalfa green leaf protein concentrates and fish marine mammal solubles				Free	Free	
		B Other						
	295	aIn airtight containers not more than 10kg each including container	Free	Free		Free	Free	
		bOther						
	296	イ More than 70yen/kg in value for customs duty, put up in containers for retail sale but not in airtight containers, excluding those containing 35% or more by weight of crude protein	Free	Free		Free	Free	
		□ Other						
		ｲIn powders, meals, flakes, pellets, cubes or similar forms, containing less than 5% by weight of sugars evaluated as sucrose, less than 20% by weight of free starch, less than 35% by weight of crude protein, other than those be separable 10% or more by weight of broken rice and flour or meal of rice taken together when determined by means of separating methods stipulated by a cabinet order						
	297	I For dogs, cats and other similar kind of ornamental animals and pet animals	Free	Free		Free	Free	
	298	II Other	12.8%	15%		12.8%	Free	
	299	▯Other	36 yen/kg	60 yen/kg			Free	

RELATED LEGAL SYSTEMS, REGULATIONS

Quarantine of Imported Animals: Based on the "Act on the Prevention of Infectious Diseases in Livestock" (https://www.maff.go.jp/aqs/index.html)

Main items	Regulatory authority	Customs Verification Documents
Pet foods, feed, dairy products, gelatine, etc.	Animal Health Division of Food Safety and Consumer Affairs Bureau, Ministry of Agriculture, Forestry and Fisheries	Quarantine certificate, etc.

- To prevent the entry of infectious animal diseases, quarantine inspections are carried out on imported livestock, animals, poultry, and animal products.
- There are some livestock animals prohibited due to epidemic control from infectious animal diseases such as foot-and-mouth disease, bovine spongiform encephalopathy (BSE), African swine fever (ASF), Classical swine fever (CSF), and highly pathogenic avian influenza. The outbreak of other infectious diseases that affect livestock animals may lead to prohibition of importing and exporting of livestock animals temporarily.

※ As of 26 August 2024, no animal health requirements for pet foods are found for Türkiye. (https://www.maff.go.jp/aqs/hou/require/petfood.html)

《Import Inspection Procedures for Animal Products》

- When importing items subject to animal quarantine (designated quarantine items), the importer must submit an "import inspection application" without delay or use NACCS for the application.
- The above application needs to be submitted to the animal quarantine service office that has jurisdiction over port of entry, with an inspection certificate or other documentation issued by the government of the exporting country attached. If using NACCS, an inspection certificate or other documentation issued by the government of the exporting country is required to be submitted to NACCS.

Quarantine of Imported Plants: Based on the "Plant Protection Act"
(https://www.maff.go.jp/pps/j/introduction/english.html)

Main items	Regulatory authority	Customs Verification Documents
Flowering plants, harmful plants, harmful animals, etc.	Plant Protection Division of Food Safety and Consumer Affairs Bureau, Ministry of Agriculture, Forestry and Fisheries	Phytosanitary certificate, etc.

- Plant quarantine is implemented for the purpose of preventing the entry of plant diseases and pests harmful to agricultural products in Japan.
- Fruits, grains, cereals, pulses (beans) are subject to plant quarantine. Meanwhile, tea leaves that went through tea manufacturing processes and other plants with advanced processes conducted are not.

《Import Inspection Procedures for Plants》

- Import inspections at the Plant Protection Station are required for ALL plants to ensure that no harmful pests are entering the country along with them.
- At Plant Protection Stations, inspection certificates issued by the exporting country (known as "phytosanitary certificates") must be submitted to ensure no harmful pests are entering the country along with the plants to be imported. The station confirms whether there is a copy of the certificate attached, whether the plant is not prohibited for import, or if there are any quarantine pests.
- The plant can be imported only after the import inspections have confirmed that it is not banned for import, and no quarantine pests attached. If the plant is prohibited from import, it cannot be imported. If quarantine pests are found from the plant, the plant cannot pass the station and will be ordered either to be disinfected, disposed, or sent back. If disinfection is ordered, the plant can be imported after being disinfected.

[Reference] Act on Ensuring of Safety of Pet Animals Feed
(https://www.maff.go.jp/e/policies/ap_health/petfood/attach/pdf/index-20.pdf)

- The law must be observed by businesses that manufacture, import, and sell pet food in Japan. When exporting bulk or end products of pet food from Türkiye to Japan, the business operators of the exporting country must comply with the said law.

Main items	Regulatory authority
Pet foods in general · Food for dogs and cats, including general nutritional food, general food, treats, chews, supplements, mineral water, etc. · Veterinary drugs, etc. are not included.	Animal Products Safety Division of Food Safety and Consumer Affairs Bureau, Ministry of Agriculture, Forestry and Fisheries

《Required Measures by Japanese Importers》

- In Japan, when a business operator or an individual sells imported pet foods, a notification must be filed to the Regional Agricultural Administration Bureau, etc., in the prefecture where the business operator's office (headquarters) is located, before starting the business.
- Imported pet foods must be recorded onto the ledger or on computer and saved for two years. (It will not be the case if directly sold to pet owners).

《Items to Record on Ledger》

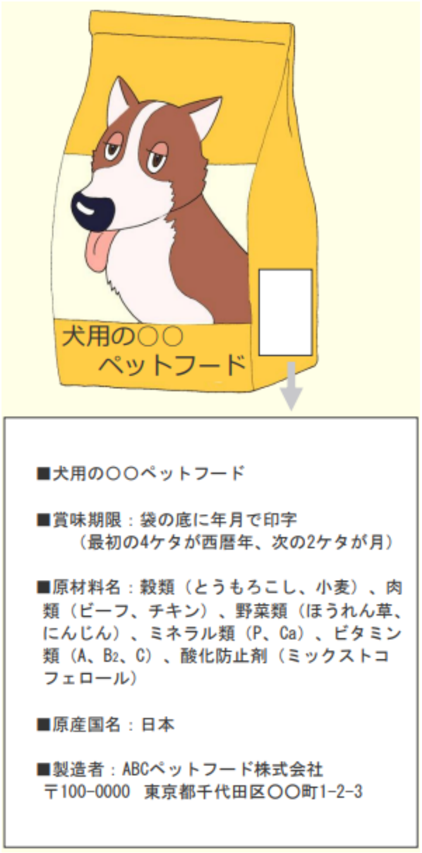
Imported pet foods	Sales to businesses
· Pet food name and volume · Date of import · Country of import destination, name of the counterpart business · Packing style of pet food · Name of country in which the pet food is manufactured, name of manufacturer, name of ingredients	· Pet food name and volume · Date of import · Country of import destination, · name of the counterpart business · Packing style of pet food · Name of country that manufactured the pet food, name of manufacturer, name of ingredients

《Labeling Standard for Pet Foods》

- Labeling in Japanese for the following five items of information is mandated on the pet food package.

Labeling	Descriptions
1. Name (Product name)	· Indication of whether the product is for dogs or cats is needed. · If difficult to identify whether it is for dogs or for cats, additional labeling is needed to discern the difference. (Labeling "For Dogs" or "For Cats" on the product name front, or in the list of product descriptions.)
2. Best before date	· Best before date needs to be described in the form and order of year/month/date or year/month. · The best before date must be based on the scientific and rational reasons.
3. Ingredients	· All ingredients (including additives) need to be listed. · If any additives such as sweeteners, food dyes, preservatives, thickening stabilizers, antioxidants, food colorants, etc. are used, both the name of the additives and intended use must be indicated. · It is preferrable to indicate ingredients in the order of the largest quantity used.
4. Country of origin	· For the country of origin, the name of the country in which final processing has substantially changed the product needs to be labeled.
5. Name and location of the businesses	· Type of business (limited to manufacturer, importer, or distributor) with name (of the company) and address must be labeled.

《Example of labeling (in Japanese)》



(Source of the above labeling example and image: "For the security of pet foods (*Pet Food no anzen kakuho no tameni*))", a brochure publicized by the Ministry of Agriculture, Forestry and Fisheries of Japan)

Market Information

MARKET TRENDS IN RECENT YEARS

《Pet foods market size transition and forecast by type》

(1,000 USD)	Fiscal year										CAGR
	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2018-2027
Total	2,449,082	2,560,430	2,732,572	2,860,616	3,037,304	3,228,443	3,349,488	3,472,577	3,604,517	3,735,211	4.8%
year on year	103.9	104.5	106.7	104.7	106.2	106.3	103.7	103.7	103.8	103.6	
Dog food	1,104,190	1,109,955	1,169,320	1,185,972	1,241,691	1,319,535	1,348,686	1,367,216	1,398,981	1,426,960	2.9%
year on year	100.9	100.5	105.3	101.4	104.7	106.3	102.2	101.4	102.3	102.0	
Cat food	1,225,074	1,329,495	1,434,650	1,543,214	1,659,056	1,770,849	1,862,881	1,967,441	2,068,030	2,171,431	6.6%
year on year	107.2	108.5	107.9	107.6	107.5	106.7	105.2	105.6	105.1	105.0	
Other pet foods	119,818	120,979	128,601	131,430	136,556	138,058	137,920	137,920	137,506	136,819	1.5%
year on year	100.6	101.0	106.3	102.2	103.9	101.1	99.9	100.0	99.7	99.5	

*The figures for 2023 are projections, and those for 2024 and onward are forecast.

(Estimated by Yano Research Institute Ltd.)

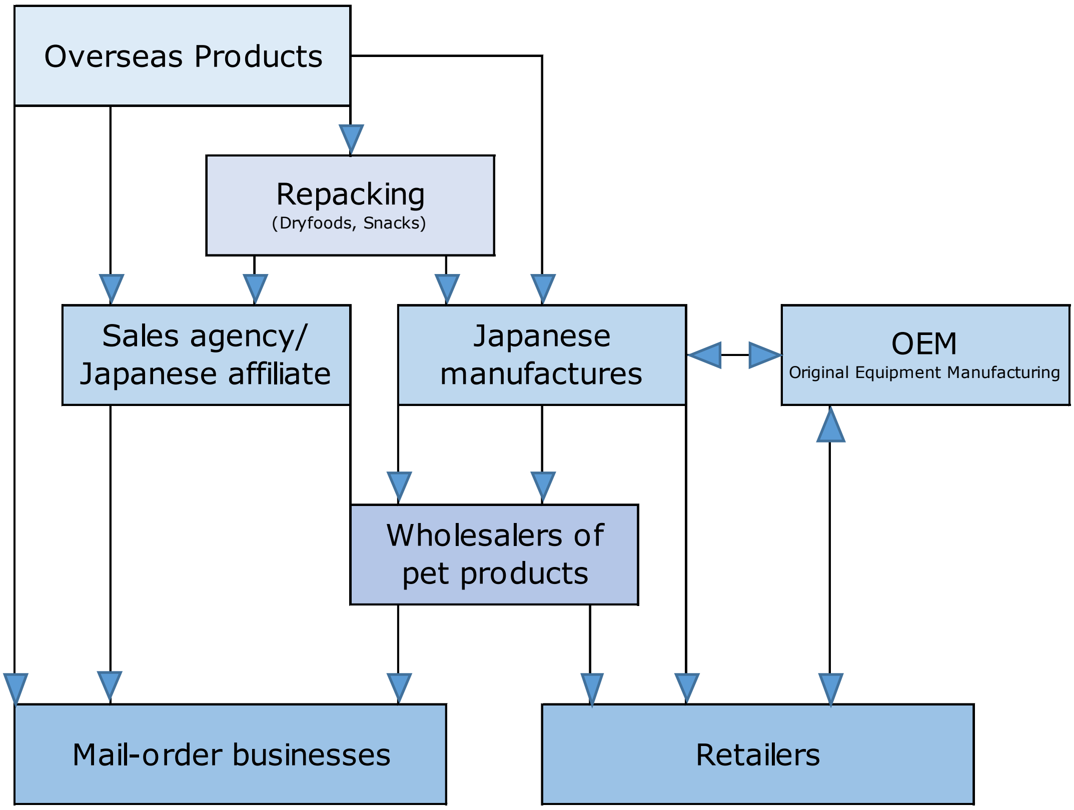
- Dog foods and cat foods are predominant in the Japanese pet food market. In large, pet foods are categorized in two major types, dry foods and wet foods, according to water content. There is also another key category of snack foods used as treats.
- While both dog foods and cat foods are in an increasing trend, cat foods show higher growth. In Japan, cats used to be reared outdoor more often than now, but they are mostly kept indoor in recent years, which triggered higher demand for the pet foods exclusively for cats.
- The snack foods for pets have shown the highest growth among all categories of pet foods. Against the backdrop of increasing consciousness about the importance of companion animals, the demand for pet treats has been growing as they are often used as communication tools with pets. In recent years, liquid type foods with some viscosity contained in a stick-shaped package made a big hit, which raised the total market size of pet snack foods. Such foods do not have to be served in a bowl or plate, and pets can eat them directly from the stick-shape package after snipping of the end of the package, which creates an opportunity to communicate with pets, and this is why the product gain a lot of popularity.

《Different pet food types: Dry food/ Wet food/ Snack》

Pet food type	Characteristics
Dry	➢ **The type of foods made from materials in a powdery state that are hardened into spherical pellets. The lower the water content, the longer they can be preserved.** ➢ **There are some dry food products (called "semi-moist type") with higher moisture for softer texture in the mouth.**
Wet	➢ **High in water content and sold mainly as canned food or in a plastic pouch.** ➢ **Better meet the taste of pets. Very popular for cats' foods.**
Snack	➢ **Mostly used as treats** ➢ **Dental gums that clean pets' teeth, especially for dogs, have been growing in demand.** ➢ **In recent years, liquid type foods with some viscosity (in paste form) contained in a stick-shaped package made a big hit.** (For details, see the section of "Characteristics of major products & top-selling products" described later.)

DISTRIBUTION, SALES CHANNEL

《Distribution of pet food products》



- Most dry pet foods supplied by major brands from the U.S. or Europe with high market share in Japan are made at overseas plants and transported to Japan by bulk transfer (the form of transporting powder and granular materials without packaging individually), and then repacked in Japan for the Japanese market.
- Wet foods are canned or retort-pouched in Thailand, and finished products are exported to Japan in many cases. This is because wet foods cannot be transported in bulk as they have to be canned or sterilized by retort-packing when completed as final products.
- Major producer country of pet snacks is China. Japanese pet food manufacturers produce their pet snack products in China, which are transported to Japan in bulk and repacked in Japan in most cases.
- In case that overseas-made pet foods are exported to Japan as completed products in the final product package, adhesive product labels prepared in accordance with “Labeling Standard for Pet Food” of Japan are often put on the final product packaging.
- Overseas-made pet foods are imported by the Japanese affiliate of manufacturers (brand owners) or sales agencies and distributed to retail channels by way of wholesalers or sold directly sold to consumers.
- Most Japanese specialty retail pet shops are small in size. This is why products are mostly distributed to retailers or mail-order businesses through wholesalers for easier deposit

reconciliation, small lot size distribution to retailers, and sales promotion for retailers. Some retailers also run their own online store or open a store on online marketplaces.

《Retail channel》

- The two major types of retail channels in Japan are the physical stores or the online stores (or mail-order businesses.)
- As for the physical stores, the most popular type of store has been shifted from pet shops (specialty stores for pet products) that used to be the mainstream to large home-improvement stores.
- Veterinary clinics also sell pet foods and supplements as pet parents often visit clinics for the care of their sick or injured pets or for the routine vaccinations, and doctors' advice or recommendation should be quite persuasive in purchasing decisions.
- As to the physical retail channels, there are two major types of sales routes. For high-priced products that often need demonstration sales, pet shops and veterinary clinics are the places to buy such products, and for low-priced products that could be sold by the self-service method, home-improvement stores should play a major role as the main sales route.
- The online (mail-order) channels recently have grown very sharply. In addition to the convenience in purchasing products, many types of products hardly available at physical stores can be found in online stores, and many customers have gradually shifted their main purchase channel from actual stores to online stores. Such online stores include major online marketplaces like Amazon and other online stores specializing in pet products.

《Major pet food retail channels and their characteristics》

Sales channel	Characteristics	Growth	Pet food business status
Pet shops	· Retailer specialized in pet supplies and services, mainly in sales of pet animals and pet grooming (trimming). · Chain stores as well as small independent retailers. · Small to medium retail space sets limits to shelving volume. Losing share to large-scale home centers and online stores in the last few years.	→	· Has competitive edge in pet product sales as pet specialty store. Merchandise high-end pet foods including imports and value-added products. · At shops selling pet animals, new pet owners often ask the stores for guidance on pet care. For this reason, some pet food makers place importance as a prime channel for first approach to acquire new customers.
DIY stores	· Favored by consumers as one-stop shop for a variety of products ranging from daily necessities to furniture, gardening supplies, and foods. · Located mainly in the suburbs, large retail space for a wide range of products.	↗	· Leading channel of pet foods. Offers a variety of pet supplies and services including pet foods, pet supplies, pet animals, and pet grooming (trimming). Some even have veterinary clinics within the store.

Supermarkets (grocery stores)	· Main channel for selling food for humans		· Many supermarkets have shelves for pet supplies, yet the space is relatively small. Strong tendency to sell only top-selling products. ·
Drug stores	· Retailers of OTC, cosmetics, daily necessities, and foods · Stores increased in recent years, and still expanding, chiefly large drugstore chains.		· Except for some stores that widen pet supply shelves, retail space and product range is limited in most stores, just like supermarkets.
Convenience stores	· Small retailer open 24 hours a day mainly selling food and beverages		· Shelves pet foods in limited spaces, only top-selling products.
Veterinary clinics	· Numbers of clinics increasing as pet owners' demand for health care services is rising. · Pet owners value veterinarians' professional opinion in pet care. They tend to follow vet's instruction on pet food especially when their pets need therapeutic diet.		· Many veterinary clinics sell pet foods and dietary supplements for pets. · Some pet foods, mainly therapeutic diet, are exclusive to veterinary clinics. · Some veterinary clinics have online stores where they sell clinic-exclusive products.
Online stores (Ecommerce)	· While the growth of overall e-commerce market is decelerating in Japan, the market is expanding rapidly as sales channel for pet supplies. · Online store types include stores in e-commerce marketplace, direct sales by manufacturers and retailers, and pet supply specialty stores. · Pet owners are increasingly attracted by Amazon Prime membership for purchase of day-to-day pet supplies as it offers free shipping, discount, and digital rewards.		· A wide selection of products, including products that are not readily available in physical stores, and highly convenient. Sales are expanding markedly as more customers are switching from offline to online. · Various store types, including direct sales by pet food manufacturers, online store in e-commerce marketplace, and online pet supply specialty store · Against the backdrop of growing demand, Amazon, the largest online store in Japan, is seemingly expanding the varieties of pet supplies.

POSITIONING OF DOMESTIC PRODUCTS AND IMPORTED PRODUCTS

《Top 10 pet food manufacturers in Japan: Transition of sales & market share》

(Companies in rows shaded in darker pale blue are overseas companies/brands.)

Transition of Sales (unit: 1,000 USD)

FY2023 Ranking	(1,000 USD) Company name	Fiscal Year 2018	2019	2020	2021	2022	2023	CAGR 2018-2023
1	Mars Japan Limited	453,577	461,187	525,470	550,585	564,092	594,004	5.5%
2	Inaba Petfood	230,296	281,252	344,120	413,606	479,783	552,578	19.1%
3	Unicharm	265,187	269,009	279,344	294,974	307,855	331,414	4.6%
4	Royal Canin Japon, Inc.	201,529	209,847	214,295	218,496	233,075	260,737	5.3%
5	Nestlé Japan	199,369	205,612	208,698	214,362	219,377	224,009	2.4%
6	Petline Ltd.	78,314	76,673	163,695	158,937	173,331	188,578	19.2%
7	Hill's-Colgate (Japan) Ltd.	191,527	190,788	190,758	189,504	187,777	182,053	-1.0%
8	Nippon Pet Food Co.,Ltd.	78,089	81,398	85,368	90,332	96,949	106,810	6.5%
9	Aixia Corporation	65,912	63,040	68,361	74,078	98,504	100,424	8.8%
10	DoggyMan H. A. Co., Ltd.	89,339	86,460	86,559	89,537	94,335	98,802	2.0%
	Other	595,943	635,163	565,903	566,203	582,225	589,034	-0.2%
	Market total	2,449,082	2,560,430	2,732,572	2,860,616	3,037,304	3,228,443	5.7%

Transition of Market Share (unit: %)

FY2023 Ranking	Company name	Fiscal Year 2018	2019	2020	2021	2022	2023	Market share Incr/Decr* 2018→2023
1	Mars Japan Limited	18.5	18.0	19.2	19.2	18.6	18.4	-0.1
2	Inaba Petfood	9.4	11.0	12.6	14.5	15.8	17.1	7.7
3	Unicharm	10.8	10.5	10.2	10.3	10.1	10.3	-0.6
4	Royal Canin Japon, Inc.	8.2	8.2	7.8	7.6	7.7	8.1	-0.2
5	Nestlé Japan	8.1	8.0	7.6	7.5	7.2	6.9	-1.2
6	Petline Ltd.	3.2	3.0	6.0	5.6	5.7	5.8	2.6
7	Hill's-Colgate (Japan) Lt	7.8	7.5	7.0	6.6	6.2	5.6	-2.2
8	Nippon Pet Food Co.,Ltd	3.2	3.2	3.1	3.2	3.2	3.3	0.1
9	Aixia Corporation	2.7	2.5	2.5	2.6	3.2	3.1	0.4
10	DoggyMan H. A. Co., Ltd	3.6	3.4	3.2	3.1	3.1	3.1	-0.6
	Other	24.3	24.8	20.7	19.8	19.2	18.2	-6.1

- In the Japanese market, overseas brands tend to emphasize their research achievements on pets accumulated for years, and Japanese brands very frequently emphasize a sense of high product security of domestic products. Recent trend shows a relative decline in market share of overseas brands due to a great success of a hit product developed by INABA-PETFOOD Co., Ltd. and marketed as "CIAO ちゅ〜る (CIAO churu)," which dramatically boosted the company's sales and made its market share much bigger.

- In the Japanese pet food market, MARS with its headquarters in the U.S. accounts for the largest market share, and they deploy wide varieties of pet food brands for both dogs and cats.
- Fourth-ranked ROYAL CANIN established its Japanese affiliate in 1991. They have a strong sales network in veterinary clinics for pet foods for diet treatment and in pet shops for total nutrition pet food products.
- Nestlé, the company ranked fifth, has the highest sales composition ratio in cat foods. On the other hand, at the seventh-ranked Hill's-Colgate, the dog foods account for the highest sales composition ratio.
- The overseas brands ranked higher in the Japanese market started pet food business in Japan from the early time of the market development and have a solid operational base and customer base, which enabled them to hold stable market shares. On the other hand, unlike in the U.S. and European countries, many pets owned and kept in Japan are small in size, and the demand for the health-conscious pet foods are drastically increasing in Japan. Further, assorted types of foods in small bags primarily for cats are also increasing in demand. As described thus far, the Japanese market has many different characteristics and unique trends, and to meet such unique market situations, some overseas manufacturers have already started to strengthen their product development and marketing specifically for the Japanese market.
- In accordance with the increasing global demand for pets, overseas pet food manufacturers have started to engage in M&A activities and investments more aggressively. In particular, they strengthened their strategies and operations in Asia and some other areas or countries where rapid growth is highly expected. For examples, MARS has established a R&D division in Japan for the Japanese market, and a separate R&D function targeting Asian markets as a part of their global strategies. Their Japanese operation and the global team have already worked closely each other to develop global products originated in Japan. ROYAL CANIN has established a plant in South Korea, which strengthened the company's supply chains in the Asian region. The plant in Korea is their first manufacturing base targeting the Asia-Pacific region as the primary markets (except for their Shanghai plant established to supply products only to the Chinese market,) and has also expanded production for the Japanese market.

《Top share overseas brands in Japan》

Company (Brands)	Country	Japanese affiliate	Brands owned
MARS	United States	MARS JAPAN LIMITED	Cesar, Dreamies, Pedigree, Sheba, PROMANAGE, IAMS, Nutro, Greenies, kal kan
ROYAL CANIN	France	ROYAL CANIN JAPON, Inc.	ROYAL CANIN
Nestlé	Switzerland	Nestlé Japan Ltd.	PURINA PRO PLAN, PURINA PRO PLAN VETERINARY DIETS, PURINA ONE, PURINA ONE, PURINA MonPetit, PURINA felix
Hill's-Colgate	United States	Hill's-Colgate (Japan) Ltd.	Hill's

CHARACTERISTICS OF MAJOR PRODUCTS & TOP-SELLING PRODUCTS

- As pet parents are increasingly seeking healthy attributes in pet foods, a variety of products have been released to serve specific needs and purposes, based on biological features, breed, age/life stage, weight, and health condition of dogs and cats. Meanwhile, there is also a high demand for better-tasting dog and cat foods. Human grade pet foods, pet foods without food additives (food additives are often despised by Japanese), and organic pet foods are increasing popularity.

- Cats are known to be particularly picky about their meals. Dry food in variety sampler (assortment of small portion packs) and wet foods are selling well.

- For treats, puree treats in squeezable package designed for hand feeding is extremely popular in Japan. Although the product was primarily for cats, the same type of product has become available for dogs in the last few years. Additionally, sales of dental treats and chews are also strong as awareness around pets' oral health is growing.

《Pet Food Product Trends》

Food type	Trends
Dog food	· Products come in a wide variety, segmented for dog's age and health condition. · New products are mostly health-conscious (i.e., for dogs with diabetes, for dental care, for joint care, for skincare/coat care, for dogs with allergies). Senior dog foods are also increasingly available. · Products highlighting "made-in-Japan" and/or "no food additives" that align with Japanese' preference for domestic products and foods without food additives, is also selling well.
Dog treats	· As senior dogs increase, and small/tiny breeds continue to be popular, soft, easy-to-chew texture is a key characteristic for dog foods, jerky treats, and chews. "Soft & chewy" and "tiny" appealed, particularly among new products and renewed products. Such products are selling well.

Food type	Trends
	· Demand is high for treats designed to "pamper dogs" or to "create a closer connection with dogs". · To serve the pet parents' demand for dental care, moves to develop oral care products have been witnessed among pet food manufacturers. · "No food additives" and "real ingredients" are some of the keywords to appeal taste and healthy attributes of dog treats.
Cat food	· In addition to conventional "hairball diets" to help with constipation, manufacturers have been developing cat foods for weight control and urinary tract infection to address growing interest for such products among cat parents. · As seen in dog foods, cat foods are also segmented by life stage. Senior cat foods are increasing every year, now there are products designed for cats aged 18 years and above. · Since cats tend to be "fussy" or "inconsistent" (go off their food occasionally) compared to dogs, a wide variety of textures and flavors are needed. Gourmet cat foods are also very popular. · While demand rises for value-added products, there is also a strong demand for bulk and/or affordable standard quality cat food, because cat parents tend to be a multi-cat household compared to dog parents.
Cat treats	· Since the success of Inaba Petfood's "CIAO Churu", other makers have been developing products in similar form. Sales of wet treats are particularly growing. · Healthy options are also increasing for cat treats, including those segmented by life stage, taste, allergen-free/hypoallergenic, and calming aids.

《Examples of Best Sellers》

Manufacturer	Product name	Size	Price (with tax) *
Inaba Petfood	CIAO Churu	14g per tube / 4 tubes	**$1.21 USD**
Ingredients (Just for reference)	Tuna, Tuna Extract, Hydrolyzed protein, Carbohydrates（Oligosaccharide, etc.）, Vegetable Oil, Thickener（Modified Starch, polysaccharide thickener), Minerals,（Na,P,Cl）, Flavors (Amino Acid, etc.), Vitamin E Supplement, Greentea Extract, Red Yeast Rice Pigment		
Feature & Benefit	Wet treats (puree) in squeezable tube designed for hand feeding, popular for creating a fun way to communicate with cats.		
Product Image (Source: Company website)	 		

* Retail price on ecommerce site (www.yodobashi.com, as of Aug 28, 2024)

Manufacturer	Product name	Size	Price (with tax) *
MARS	Sheba Duo	20g per tube / 10 tubes	$3.3 USD
Ingredients (Just for reference)	Meat (Chicken, Powdered Chicken, Beef/Mutton By-Products, Poultry By-Products, Powdered Poultry, Chicken Tender Extracts, Beef Extracts), Cereals (Corn, Rice, Wheat), Oils, Yeast, Fish (Tuna Extracts, Snow Crab Extract, Sea Bream Extract, Scallop Extract), Vitamin Supplements (A, B1, B2, B6, B12, D3, E, Choline, niacin, pantothenic acid, folate), Minerals (Ca, Cl, Cu, Fe, I, K, Mn, Na, Se, Zn), Amino Acid (Taurine), Colorants (Caramel, Blue 2, Red 102, Yellow 4), antioxidants (BHA, BHT, Citric Acid)		
Feature & Benefit	Crispy dough (outer skin) filled with puree that melts at the temperature of a cat's tongue. 4 flavors are individually packaged (assorted pack). The product in the photo is an assortment of 4 flavors that uses tuna as a base flavor, added with snow crab, sea bream, scallop, and chicken tenders.		
Product image (Source: Company website)	 		

* Retail price on ecommerce site (www.yodobashi.com, as of Aug 28, 2024)

MAJOR IMPORTERS

- Pet foods produced overseas must comply with Japan's "Labeling Standards for Pet Food". Moreover, there are legal requirements for importers to comply with protocols regarding import control and quality control. For this reason, in most cases, a Japanese subsidiary of an overseas brand is established, or an agency agreement is concluded in Japan. Trading companies that specialize in importing overseas pet foods are relatively small.

Company Name	Location	Company Outline	URL
JAPELL Co., Ltd.	105 Momoyama-cho 3-chome, Kasugai City, Aichi Prefecture	Wholesale of pet food and pet supplies, export and import of pet food and pet supplies	https://www.japell.com/
SHINTOA CORPORATION	8th Floor, Marunouchi Center Bldg., 6-1, Marunouchi 1-chome, Chiyoda-ku, Tokyo	General trading company that has strength in pet supplies	https://www.shintoa.co.jp/
Japan Wayne Co., Ltd.	10-5 Yokoe 2-chome, Ibaraki, Osaka	Import, wholesale, and retail of pet supplies	https://www.wayne.jp/
DADWAYPET, INC.	15-12 Shinyokohama 2-chome, Kohoku, Yokohama, Kanagawa	Planning and development of pet-related products, import of pet food and supplies	https://www.dadwaypet.com/
Tokyo Pet Shoji	東京都渋谷区西原 1-31-4	欧米メーカーのペット用品輸入・卸販売	**https://www.tokyopetshoji.com/**
Diusa Pet Japan Co., Ltd.	Sanwa Building 4F, 27-17, Hamamatsucho 1-chome, Minato-ku, Tokyo	Pet food importer	https://diusapet.jp/

Appendix: Recent Violations of Japanese Food Safety Laws by Imported Food Products（FY2023 - 2024）

◆FY2023

Item	Country	Contents of violation	Cause of violation	Disposal of the cargo	Remarks
Protein Musli Vegan	Germany	cyanide 17mg/kg detection	Lack of understanding of Japanese food safety standards	Abandonment or return of the cargo (the whole quantity is kept)	independence inspection
Soy Protein (Chicosoy Devilled Chicken 90g)	Sri Lanka	violation of standard of use（sodium benzoate 42.37g/kg use (use of sodium benzoate overuse for dough as raw material, use of potassium sorbate in other than target food)	Shipped goods that were not originally intended to be shipped to Japan	Abandonment or return of the cargo (the whole quantity is kept)	administration inspection
Chocolate (Assorted Pack)	Estonia	undesignated additive (azorubine detection, brilliant black)	Use of raw materials intended for foods exported to other countries	Abandonment or return of the cargo (the whole quantity is kept)	independence inspection, administration inspection
Chocolate: Novipiu Pistacchio	Italy	aflatoxin (mycotoxin) 76μg/kg（B1: 68.5μg/kg, B2 : 7.9μg/kg）detected	Incidence of aflatoxin contamination is ubiquitous	Abandonment or return of the cargo (the whole quantity is kept)	independence inspection
Chocolate Pineapple Ball)	Thailand	violation of standard of use (sulfur dioxide 0.051g/kg detection)	Improper management	Abandonment or return of the cargo (the whole quantity is kept)	independence inspection
Chocolate: Dark Chocolate Enrobed Orange Sticks	UK	violation of standard of use (potassium sorbate (as sorbic acid) 0.396 g/kg detection)（use of potassium sorbate overuse for syrup、use of potassium sorbate in other than target food for orange peel as raw material)	Miscommunication between manufacturer and ingredient supplier	Abandonment or return of the cargo (the whole quantity is kept)	independence inspection, administration inspection
Chocolate（Pistachio & Honey（Honey & New Caramel Choc ＋ Pistachios Mini Slab 100g））	UK	aflatoxin (mycotoxin) 132μg/kg（B1: 125.2μg/kg、B2: 7.1μg/kg） detected	Not specified	Abandonment or return of the cargo (the whole quantity is kept)	ordered inspection
Biscuits: Flax Seed Biscuit	Pakistan	Cyanide 15mg/kg detection		Abandonment or return of the cargo (the whole quantity is kept)	independence inspection
Biscuits（Choco Rogo Rolled Wafer With Hazelnut Cream）	**Türkiye**	**undesignated additive (TBHQ 0.005 g/kg detection)**		**Abandonment or return of the cargo (the whole quantity is kept)**	**independence inspection**
Biscuits（Cikilop, Cocoa Coated Sandwich Biscuit	**Türkiye**	**violation of standard of use (sulfur dioxide 0.047 g/kg detection)**		**Abandonment or return of the cargo (the whole quantity is kept)**	**independence inspection**

Item	Country	Contents of violation	Cause of violation	Disposal of the cargo	Remarks
Protein Musli Vegan	Germany	cyanide 17mg/kg detection	Lack of understanding of Japanese food safety standards	Abandonment or return of the cargo (the whole quantity is kept)	independence inspection
Soy Protein (Chicosoy Devilled Chicken 90g)	Sri Lanka	violation of standard of use（sodium benzoate 42.37g/kg use (use of sodium benzoate overuse for dough as raw material, use of potassium sorbate in other than target food)	Shipped goods that were not originally intended to be shipped to Japan	Abandonment or return of the cargo (the whole quantity is kept)	administration inspection
Chocolate (Assorted Pack)	Estonia	undesignated additive (azorubine detection, brilliant black)	Use of raw materials intended for foods exported to other countries	Abandonment or return of the cargo (the whole quantity is kept)	independence inspection, administration inspection
Chocolate: Novipiu Pistacchio	Italy	aflatoxin (mycotoxin) 76μg/kg（B1: 68.5μg/kg, B2 : 7.9μg/kg）detected	Incidence of aflatoxin contamination is ubiquitous	Abandonment or return of the cargo (the whole quantity is kept)	independence inspection
Chocolate Pineapple Ball)	Thailand	violation of standard of use (sulfur dioxide 0.051g/kg detection)	Improper management	Abandonment or return of the cargo (the whole quantity is kept)	independence inspection
Chocolate: Dark Chocolate Enrobed Orange Sticks	UK	violation of standard of use (potassium sorbate (as sorbic acid) 0.396 g/kg detection)（use of potassium sorbate overuse for syrup、use of potassium sorbate in other than target food for orange peel as raw material)	Miscommunication between manufacturer and ingredient supplier	Abandonment or return of the cargo (the whole quantity is kept)	independence inspection, administration inspection
Chocolate（Pistachio & Honey（Honey & New Caramel Choc ＋ Pistachios Mini Slab 100g））	UK	aflatoxin (mycotoxin) 132μg/kg（B1: 125.2μg/kg、B2: 7.1μg/kg） detected	Not specified	Abandonment or return of the cargo (the whole quantity is kept)	ordered inspection
Biscuits: Flax Seed Biscuit	Pakistan	Cyanide 15mg/kg detection		Abandonment or return of the cargo (the whole quantity is kept)	independence inspection
Biscuits（Choco Rogo Rolled Wafer With Hazelnut Cream)	**Türkiye**	**undesignated additive (TBHQ 0.005 g/kg detection)**		**Abandonment or return of the cargo (the whole quantity is kept)**	**independence inspection**
With Marshmallow)					
Biscuits（Cikilopcuk, Cocoa And Coconut Coated Sandwich Biscuit)	**Türkiye**	**violation of standard of use (sulfur dioxide 0.059 g/kg detection)**		**Abandonment or return of the cargo (the whole quantity is kept)**	**independence inspection**
Biscuits（Cikilopcuk, Cocoa Coated Sandwich Biscuit)	**Türkiye**	**violation of standard of use (sulfur dioxide 0.059 g/kg detection)**		**Abandonment or return of the cargo (the whole quantity is kept)**	**independence inspection**

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Protein Musli Vegan	Germany	cyanide 17mg/kg detection	Lack of understanding of Japanese food safety standards	Abandonment or return of the cargo (the whole quantity is kept)	independence inspection
Soy Protein (Chicosoy Devilled Chicken 90g)	Sri Lanka	violation of standard of use（sodium benzoate 42.37g/kg use (use of sodium benzoate overuse for dough as raw material, use of potassium sorbate in other than target food)	Shipped goods that were not originally intended to be shipped to Japan	Abandonment or return of the cargo (the whole quantity is kept)	administration inspection
Chocolate (Assorted Pack)	Estonia	undesignated additive (azorubine detection, brilliant black)	Use of raw materials intended for foods exported to other countries	Abandonment or return of the cargo (the whole quantity is kept)	independence inspection, administration inspection
Chocolate: Novipiu Pistacchio	Italy	aflatoxin (mycotoxin) 76μg/kg（B1: 68.5μg/kg, B2 : 7.9μg/kg）detected	Incidence of aflatoxin contamination is ubiquitous	Abandonment or return of the cargo (the whole quantity is kept)	independence inspection
Chocolate Pineapple Ball)	Thailand	violation of standard of use (sulfur dioxide 0.051g/kg detection)	Improper management	Abandonment or return of the cargo (the whole quantity is kept)	independence inspection
Chocolate: Dark Chocolate Enrobed Orange Sticks	UK	violation of standard of use (potassium sorbate (as sorbic acid) 0.396 g/kg detection)（use of potassium sorbate overuse for syrup、use of potassium sorbate in other than target food for orange peel as raw material)	Miscommunication between manufacturer and ingredient supplier	Abandonment or return of the cargo (the whole quantity is kept)	independence inspection, administration inspection
Chocolate（Pistachio & Honey（Honey & New Caramel Choc ＋ Pistachios Mini Slab 100g））	UK	aflatoxin (mycotoxin) 132μg/kg（B1: 125.2μg/kg、B2: 7.1μg/kg） detected	Not specified	Abandonment or return of the cargo (the whole quantity is kept)	ordered inspection
Biscuits: Flax Seed Biscuit	Pakistan	Cyanide 15mg/kg detection		Abandonment or return of the cargo (the whole quantity is kept)	independence inspection
Biscuits（Choco Rogo Rolled Wafer With Hazelnut Cream）	**Türkiye**	**undesignated additive (TBHQ 0.005 g/kg detection)**		**Abandonment or return of the cargo (the whole quantity is kept)**	**independence inspection**
Biscuits (Crackzel-Garlic Bread Pretzel Pieces)	**Türkiye**	**undesignated additive (TBHQ 1μg/g detection)**	**Used in ingredients (oil)**	**Abandonment or return of the cargo (the whole quantity is kept)**	**monitoring inspection**
Biscuits (Crackzel-Hot Buffalo Wings Pretzel Pieces)	**Türkiye**	**undesignated additive (TBHQ 35μg/g detection)**	**Used in ingredients (oil)**	**Abandonment or return of the cargo (the whole quantity is kept)**	**monitoring inspection**
Biscuits（Maxi Green Lady(Italian Artisan Cookie)/Whole Meal Biscuit With Pistachios, Honey And Ginger)	Italy	aflatoxin (mycotoxin) 40μg/kg（B1: 36.4μg/kg, B2: 3.2μg/kg）detected	Inadequate management of raw materials	Abandonment or return of the cargo (the whole quantity is kept)	ordered inspection

Item	Country	Contents of violation	Cause of violation	Disposal of the cargo	Remarks
Protein Musli Vegan	Germany	cyanide 17mg/kg detection	Lack of understanding of Japanese food safety standards	Abandonment or return of the cargo (the whole quantity is kept)	independence inspection
Soy Protein (Chicosoy Devilled Chicken 90g)	Sri Lanka	violation of standard of use（sodium benzoate 42.37g/kg use (use of sodium benzoate overuse for dough as raw material, use of potassium sorbate in other than target food)	Shipped goods that were not originally intended to be shipped to Japan	Abandonment or return of the cargo (the whole quantity is kept)	administration inspection
Chocolate (Assorted Pack)	Estonia	undesignated additive (azorubine detection, brilliant black)	Use of raw materials intended for foods exported to other countries	Abandonment or return of the cargo (the whole quantity is kept)	independence inspection, administration inspection
Chocolate: Novipiu Pistacchio	Italy	aflatoxin (mycotoxin) 76μg/kg（B1: 68.5μg/kg, B2 : 7.9μg/kg）detected	Incidence of aflatoxin contamination is ubiquitous	Abandonment or return of the cargo (the whole quantity is kept)	independence inspection
Chocolate Pineapple Ball)	Thailand	violation of standard of use (sulfur dioxide 0.051g/kg detection)	Improper management	Abandonment or return of the cargo (the whole quantity is kept)	independence inspection
Chocolate: Dark Chocolate Enrobed Orange Sticks	UK	violation of standard of use (potassium sorbate (as sorbic acid) 0.396 g/kg detection)（use of potassium sorbate overuse for syrup、use of potassium sorbate in other than target food for orange peel as raw material)	Miscommunication between manufacturer and ingredient supplier	Abandonment or return of the cargo (the whole quantity is kept)	independence inspection, administration inspection
Chocolate（Pistachio & Honey（Honey & New Caramel Choc ＋ Pistachios Mini Slab 100g））	UK	aflatoxin (mycotoxin) 132μg/kg（B1: 125.2μg/kg、B2: 7.1μg/kg） detected	Not specified	Abandonment or return of the cargo (the whole quantity is kept)	ordered inspection
Biscuits: Flax Seed Biscuit	Pakistan	Cyanide 15mg/kg detection		Abandonment or return of the cargo (the whole quantity is kept)	independence inspection
Biscuits（Choco Rogo Rolled Wafer With Hazelnut Cream）	**Türkiye**	**undesignated additive (TBHQ 0.005 g/kg detection)**		**Abandonment or return of the cargo (the whole quantity is kept)**	**independence inspection**
Biscuits (Crackzel-Honey Mustard Onion Pretzel Pieces)	**Türkiye**	**undesignated additive (TBHQ 2μg/g detection)**	**Insufficient cleaning and sanitation of production line at manufacturing location**	**Abandonment**	**independence inspection**
Biscuits (Crackzel-Cheddar Cheese Pretzel Pieces)	**Türkiye**	**undesignated additive (TBHQ 2μg/g detection)**	**Insufficient cleaning and sanitation of production line at manufacturing location**	**Abandonment**	**independence inspection**
Biscuits (Crackzel-Garlic Bread Pretzel Pieces)	**Türkiye**	**undesignated additive (TBHQ 2μg/g detection)**	**Insufficient cleaning and sanitation of production line at**	**Abandonment**	**independence inspection**

Item	Country	Contents of violation	Cause of violation	Disposal of the cargo	Remarks
Protein Musli Vegan	Germany	cyanide 17mg/kg detection	Lack of understanding of Japanese food safety standards	Abandonment or return of the cargo (the whole quantity is kept)	independence inspection
Soy Protein (Chicosoy Devilled Chicken 90g)	Sri Lanka	violation of standard of use（sodium benzoate 42.37g/kg use (use of sodium benzoate overuse for dough as raw material, use of potassium sorbate in other than target food)	Shipped goods that were not originally intended to be shipped to Japan	Abandonment or return of the cargo (the whole quantity is kept)	administration inspection
Chocolate (Assorted Pack)	Estonia	undesignated additive (azorubine detection, brilliant black)	Use of raw materials intended for foods exported to other countries	Abandonment or return of the cargo (the whole quantity is kept)	independence inspection, administration inspection
Chocolate: Novipiu Pistacchio	Italy	aflatoxin (mycotoxin) 76μg/kg（B1: 68.5μg/kg, B2 : 7.9μg/kg）detected	Incidence of aflatoxin contamination is ubiquitous	Abandonment or return of the cargo (the whole quantity is kept)	independence inspection
Chocolate Pineapple Ball)	Thailand	violation of standard of use (sulfur dioxide 0.051g/kg detection)	Improper management	Abandonment or return of the cargo (the whole quantity is kept)	independence inspection
Chocolate: Dark Chocolate Enrobed Orange Sticks	UK	violation of standard of use (potassium sorbate (as sorbic acid) 0.396 g/kg detection)（use of potassium sorbate overuse for syrup、use of potassium sorbate in other than target food for orange peel as raw material）	Miscommunication between manufacturer and ingredient supplier	Abandonment or return of the cargo (the whole quantity is kept)	independence inspection, administration inspection
Chocolate （Pistachio & Honey （Honey & New Caramel Choc ＋ Pistachios Mini Slab 100g））	UK	aflatoxin (mycotoxin) 132μg/kg（B1: 125.2μg/kg、B2: 7.1μg/kg） detected	Not specified	Abandonment or return of the cargo (the whole quantity is kept)	ordered inspection
Biscuits: Flax Seed Biscuit	Pakistan	Cyanide 15mg/kg detection		Abandonment or return of the cargo (the whole quantity is kept)	independence inspection
Biscuits （Choco Rogo Rolled Wafer With Hazelnut Cream）	**Türkiye**	**undesignated additive (TBHQ 0.005 g/kg detection)**		**Abandonment or return of the cargo (the whole quantity is kept)**	**independence inspection**
			manufacturing location		
Biscuits (Crackzel-Hot Buffalo Wings Pretzel Pieces)	**Türkiye**	**undesignated additive (TBHQ 2μg/g detection)**	**Insufficient cleaning and sanitation of production line at manufacturing location**	**Abandonment**	**independence inspection**
Biscuits :Maxi Green Lady (Italian Artisan Cookie)/Whole Meal Biscuit With Pistachios, Honey And Ginger)	Italy	aflatoxin (mycotoxin) 38μg/kg（B1: 35.5μg/kg, B2 : 2.8μg/kg）detected	Insufficient inspection prior to exporting	Abandonment	ordered inspection

Item	Country	Contents of violation	Cause of violation	Disposal of the cargo	Remarks
Protein Musli Vegan	Germany	cyanide 17mg/kg detection	Lack of understanding of Japanese food safety standards	Abandonment or return of the cargo (the whole quantity is kept)	independence inspection
Soy Protein (Chicosoy Devilled Chicken 90g)	Sri Lanka	violation of standard of use（sodium benzoate 42.37g/kg use (use of sodium benzoate overuse for dough as raw material, use of potassium sorbate in other than target food)	Shipped goods that were not originally intended to be shipped to Japan	Abandonment or return of the cargo (the whole quantity is kept)	administration inspection
Chocolate (Assorted Pack)	Estonia	undesignated additive (azorubine detection, brilliant black)	Use of raw materials intended for foods exported to other countries	Abandonment or return of the cargo (the whole quantity is kept)	independence inspection, administration inspection
Chocolate: Novipiu Pistacchio	Italy	aflatoxin (mycotoxin) 76μg/kg（B1: 68.5μg/kg, B2 : 7.9μg/kg）detected	Incidence of aflatoxin contamination is ubiquitous	Abandonment or return of the cargo (the whole quantity is kept)	independence inspection
Chocolate Pineapple Ball)	Thailand	violation of standard of use (sulfur dioxide 0.051g/kg detection)	Improper management	Abandonment or return of the cargo (the whole quantity is kept)	independence inspection
Chocolate: Dark Chocolate Enrobed Orange Sticks	UK	violation of standard of use (potassium sorbate (as sorbic acid) 0.396 g/kg detection)（use of potassium sorbate overuse for syrup、use of potassium sorbate in other than target food for orange peel as raw material)	Miscommunication between manufacturer and ingredient supplier	Abandonment or return of the cargo (the whole quantity is kept)	independence inspection, administration inspection
Chocolate（Pistachio & Honey（Honey & New Caramel Choc ＋ Pistachios Mini Slab 100g））	UK	aflatoxin (mycotoxin) 132μg/kg（B1: 125.2μg/kg、B2: 7.1μg/kg） detected	Not specified	Abandonment or return of the cargo (the whole quantity is kept)	ordered inspection
Biscuits: Flax Seed Biscuit	Pakistan	Cyanide 15mg/kg detection		Abandonment or return of the cargo (the whole quantity is kept)	independence inspection
Biscuits（Choco Rogo Rolled Wafer With Hazelnut Cream)	**Türkiye**	**undesignated additive (TBHQ 0.005 g/kg detection)**		**Abandonment or return of the cargo (the whole quantity is kept)**	**independence inspection**
Biscuits（Davids Biscuits Tin)	US	aflatoxin (mycotoxin)（1) 19μg/kg（B1: 17.8μg/kg, B2 :1.6μg/kg,）detected, (2) 17μg/kg（B1: 15.4μg/kg, B2: 1.8μg/kg) detected	Lack of knowledge of Japanese food safety standards	Abandonment、or return of the cargo (the whole quantity is kept)	monitoring inspection
Chickpeas	US	violation of compositional standard (piperonyl butoxide 1.1ppm detection)	Improper management on use of agrochemicals	Export to a third country	monitoring inspection

Item	Country	Contents of violation	Cause of violation	Disposal of the cargo	Remarks
Protein Musli Vegan	Germany	cyanide 17mg/kg detection	Lack of understanding of Japanese food safety standards	Abandonment or return of the cargo (the whole quantity is kept)	independence inspection
Soy Protein (Chicosoy Devilled Chicken 90g)	Sri Lanka	violation of standard of use（sodium benzoate 42.37g/kg use (use of sodium benzoate overuse for dough as raw material, use of potassium sorbate in other than target food)	Shipped goods that were not originally intended to be shipped to Japan	Abandonment or return of the cargo (the whole quantity is kept)	administration inspection
Chocolate (Assorted Pack)	Estonia	undesignated additive (azorubine detection, brilliant black)	Use of raw materials intended for foods exported to other countries	Abandonment or return of the cargo (the whole quantity is kept)	independence inspection, administration inspection
Chocolate: Novipiu Pistacchio	Italy	aflatoxin (mycotoxin) 76μg/kg（B1: 68.5μg/kg, B2 : 7.9μg/kg）detected	Incidence of aflatoxin contamination is ubiquitous	Abandonment or return of the cargo (the whole quantity is kept)	independence inspection
Chocolate Pineapple Ball)	Thailand	violation of standard of use (sulfur dioxide 0.051g/kg detection)	Improper management	Abandonment or return of the cargo (the whole quantity is kept)	independence inspection
Chocolate: Dark Chocolate Enrobed Orange Sticks	UK	violation of standard of use (potassium sorbate (as sorbic acid) 0.396 g/kg detection)（use of potassium sorbate overuse for syrup、use of potassium sorbate in other than target food for orange peel as raw material）	Miscommunication between manufacturer and ingredient supplier	Abandonment or return of the cargo (the whole quantity is kept)	independence inspection, administration inspection
Chocolate（Pistachio & Honey（Honey & New Caramel Choc ＋ Pistachios Mini Slab 100g））	UK	aflatoxin (mycotoxin) 132μg/kg（B1: 125.2μg/kg、B2: 7.1μg/kg） detected	Not specified	Abandonment or return of the cargo (the whole quantity is kept)	ordered inspection
Biscuits: Flax Seed Biscuit	Pakistan	Cyanide 15mg/kg detection		Abandonment or return of the cargo (the whole quantity is kept)	independence inspection
Biscuits（Choco Rogo Rolled Wafer With Hazelnut Cream）	**Türkiye**	**undesignated additive (TBHQ 0.005 g/kg detection)**		**Abandonment or return of the cargo (the whole quantity is kept)**	**independence inspection**
Butter Beans	Myanmar	cyanide 550ppm detection	Inadequate sorting	Return of the cargo	ordered inspection
Chickpeas	India	detection over the amount unlikely to cause damage to human health that the provision of Paragraph 3, Article 13 of the Food Sanitation Act (chlorpyrifos 0.02 ppm detection)		Abandonment, or return of the cargo (the whole quantity is kept)	monitoring inspection

Item	Country	Contents of violation	Cause of violation	Disposal of the cargo	Remarks
Protein Musli Vegan	Germany	cyanide 17mg/kg detection	Lack of understanding of Japanese food safety standards	Abandonment or return of the cargo (the whole quantity is kept)	independence inspection
Soy Protein (Chicosoy Devilled Chicken 90g)	Sri Lanka	violation of standard of use（sodium benzoate 42.37g/kg use (use of sodium benzoate overuse for dough as raw material, use of potassium sorbate in other than target food)	Shipped goods that were not originally intended to be shipped to Japan	Abandonment or return of the cargo (the whole quantity is kept)	administration inspection
Chocolate (Assorted Pack)	Estonia	undesignated additive (azorubine detection, brilliant black)	Use of raw materials intended for foods exported to other countries	Abandonment or return of the cargo (the whole quantity is kept)	independence inspection, administration inspection
Chocolate: Novipiu Pistacchio	Italy	aflatoxin (mycotoxin) 76μg/kg（B1: 68.5μg/kg, B2 : 7.9μg/kg）detected	Incidence of aflatoxin contamination is ubiquitous	Abandonment or return of the cargo (the whole quantity is kept)	independence inspection
Chocolate Pineapple Ball)	Thailand	violation of standard of use (sulfur dioxide 0.051g/kg detection)	Improper management	Abandonment or return of the cargo (the whole quantity is kept)	independence inspection
Chocolate: Dark Chocolate Enrobed Orange Sticks	UK	violation of standard of use (potassium sorbate (as sorbic acid) 0.396 g/kg detection)（use of potassium sorbate overuse for syrup、use of potassium sorbate in other than target food for orange peel as raw material)	Miscommunication between manufacturer and ingredient supplier	Abandonment or return of the cargo (the whole quantity is kept)	independence inspection, administration inspection
Chocolate（Pistachio & Honey（Honey & New Caramel Choc ＋ Pistachios Mini Slab 100g））	UK	aflatoxin (mycotoxin) 132μg/kg（B1: 125.2μg/kg、B2: 7.1μg/kg） detected	Not specified	Abandonment or return of the cargo (the whole quantity is kept)	ordered inspection
Biscuits: Flax Seed Biscuit	Pakistan	Cyanide 15mg/kg detection		Abandonment or return of the cargo (the whole quantity is kept)	independence inspection
Biscuits（Choco Rogo Rolled Wafer With Hazelnut Cream）	**Türkiye**	**undesignated additive (TBHQ 0.005 g/kg detection)**		**Abandonment or return of the cargo (the whole quantity is kept)**	**independence inspection**
Chickpeas	India	detection over the amount unlikely to cause damage to human health that the provision of Paragraph 3, Article 13 of the Food Sanitation Act (chlorpyrifos 0.02 ppm detection)	Inadequate management in the use of agrochemicals	Abandonment	ordered inspection
Butter Beans	Myanmar	Cyanide 530ppm detection	Increase during transportation	Abandonment or return of the cargo (the whole quantity is kept	ordered inspection
Chickpeas	India	detection over the amount unlikely to cause damage to human health that the provision of Paragraph 3, Article 13 of the Food	Inadequate management in the use of agrochemicals	Abandonment or return of the cargo (the whole quantity is kept	ordered inspection

Item	Country	Contents of violation	Cause of violation	Disposal of the cargo	Remarks
Protein Musli Vegan	Germany	cyanide 17mg/kg detection	Lack of understanding of Japanese food safety standards	Abandonment or return of the cargo (the whole quantity is kept)	independence inspection
Soy Protein (Chicosoy Devilled Chicken 90g)	Sri Lanka	violation of standard of use（sodium benzoate 42.37g/kg use (use of sodium benzoate overuse for dough as raw material, use of potassium sorbate in other than target food)	Shipped goods that were not originally intended to be shipped to Japan	Abandonment or return of the cargo (the whole quantity is kept)	administration inspection
Chocolate (Assorted Pack)	Estonia	undesignated additive (azorubine detection, brilliant black)	Use of raw materials intended for foods exported to other countries	Abandonment or return of the cargo (the whole quantity is kept)	independence inspection, administration inspection
Chocolate: Novipiu Pistacchio	Italy	aflatoxin (mycotoxin) 76μg/kg（B1: 68.5μg/kg, B2 : 7.9μg/kg）detected	Incidence of aflatoxin contamination is ubiquitous	Abandonment or return of the cargo (the whole quantity is kept)	independence inspection
Chocolate Pineapple Ball)	Thailand	violation of standard of use (sulfur dioxide 0.051g/kg detection)	Improper management	Abandonment or return of the cargo (the whole quantity is kept)	independence inspection
Chocolate: Dark Chocolate Enrobed Orange Sticks	UK	violation of standard of use (potassium sorbate (as sorbic acid) 0.396 g/kg detection)（use of potassium sorbate overuse for syrup、use of potassium sorbate in other than target food for orange peel as raw material)	Miscommunication between manufacturer and ingredient supplier	Abandonment or return of the cargo (the whole quantity is kept)	independence inspection, administration inspection
Chocolate（Pistachio & Honey（Honey & New Caramel Choc ＋ Pistachios Mini Slab 100g））	UK	aflatoxin (mycotoxin) 132μg/kg（B1: 125.2μg/kg、B2: 7.1μg/kg） detected	Not specified	Abandonment or return of the cargo (the whole quantity is kept)	ordered inspection
Biscuits: Flax Seed Biscuit	Pakistan	Cyanide 15mg/kg detection		Abandonment or return of the cargo (the whole quantity is kept)	independence inspection
Biscuits（Choco Rogo Rolled Wafer With Hazelnut Cream）	**Türkiye**	**undesignated additive (TBHQ 0.005 g/kg detection)**		**Abandonment or return of the cargo (the whole quantity is kept)**	**independence inspection**
		Sanitation Act (chlorpyrifos 0.03 ppm detection)			
Chickpeas	India	detection over the amount unlikely to cause damage to human health that the provision of Paragraph 3 , Article 13 of the Food Sanitation Act (chlorpyrifos 0.03 ppm detection)	Inadequate management in the use of agrochemicals	Abandonment or return of the cargo (the whole quantity is kept	ordered inspection
Chickpeas	India	detection over the amount unlikely to cause damage to human health that the provision of Paragraph 3,		Abandonment or return of the cargo (the whole quantity is kept	ordered inspection

Item	Country	Contents of violation	Cause of violation	Disposal of the cargo	Remarks
Protein Musli Vegan	Germany	cyanide 17mg/kg detection	Lack of understanding of Japanese food safety standards	Abandonment or return of the cargo (the whole quantity is kept)	independence inspection
Soy Protein (Chicosoy Devilled Chicken 90g)	Sri Lanka	violation of standard of use（sodium benzoate 42.37g/kg use (use of sodium benzoate overuse for dough as raw material, use of potassium sorbate in other than target food)	Shipped goods that were not originally intended to be shipped to Japan	Abandonment or return of the cargo (the whole quantity is kept)	administration inspection
Chocolate (Assorted Pack)	Estonia	undesignated additive (azorubine detection, brilliant black)	Use of raw materials intended for foods exported to other countries	Abandonment or return of the cargo (the whole quantity is kept)	independence inspection, administration inspection
Chocolate: Novipiu Pistacchio	Italy	aflatoxin (mycotoxin) 76μg/kg（B1: 68.5μg/kg, B2 : 7.9μg/kg）detected	Incidence of aflatoxin contamination is ubiquitous	Abandonment or return of the cargo (the whole quantity is kept)	independence inspection
Chocolate Pineapple Ball)	Thailand	violation of standard of use (sulfur dioxide 0.051g/kg detection)	Improper management	Abandonment or return of the cargo (the whole quantity is kept)	independence inspection
Chocolate: Dark Chocolate Enrobed Orange Sticks	UK	violation of standard of use (potassium sorbate (as sorbic acid) 0.396 g/kg detection)（use of potassium sorbate overuse for syrup、use of potassium sorbate in other than target food for orange peel as raw material）	Miscommunication between manufacturer and ingredient supplier	Abandonment or return of the cargo (the whole quantity is kept)	independence inspection, administration inspection
Chocolate（Pistachio & Honey（Honey & New Caramel Choc ＋ Pistachios Mini Slab 100g））	UK	aflatoxin (mycotoxin) 132μg/kg（B1: 125.2μg/kg、B2: 7.1μg/kg） detected	Not specified	Abandonment or return of the cargo (the whole quantity is kept)	ordered inspection
Biscuits: Flax Seed Biscuit	Pakistan	Cyanide 15mg/kg detection		Abandonment or return of the cargo (the whole quantity is kept)	independence inspection
Biscuits（Choco Rogo Rolled Wafer With Hazelnut Cream）	**Türkiye**	**undesignated additive (TBHQ 0.005 g/kg detection)**		**Abandonment or return of the cargo (the whole quantity is kept)**	**independence inspection**
		Article 13 of the Food Sanitation Act (chlorpyrifos 0.04 ppm detection))			
Chickpeas	India	detection over the amount unlikely to cause damage to human health that the provision of Paragraph 3, Article 13 of the Food Sanitation Act (chlorpyrifos 0.06 ppm detection)	Lack of knowledge of Food Sanitation Act	Abandonment or return of the cargo (the whole quantity is kept	ordered inspection
Kidney Bean	Argentina	detection over the amount unlikely to cause damage to human health that the provision of Paragraph 3 ,	Pesticides residue	Abandonment or return of the cargo (the whole quantity is kept	monitoring inspection

Item	Country	Contents of violation	Cause of violation	Disposal of the cargo	Remarks
Protein Musli Vegan	Germany	cyanide 17mg/kg detection	Lack of understanding of Japanese food safety standards	Abandonment or return of the cargo (the whole quantity is kept)	independence inspection
Soy Protein (Chicosoy Devilled Chicken 90g)	Sri Lanka	violation of standard of use（sodium benzoate 42.37g/kg use (use of sodium benzoate overuse for dough as raw material, use of potassium sorbate in other than target food)	Shipped goods that were not originally intended to be shipped to Japan	Abandonment or return of the cargo (the whole quantity is kept)	administration inspection
Chocolate (Assorted Pack)	Estonia	undesignated additive (azorubine detection, brilliant black)	Use of raw materials intended for foods exported to other countries	Abandonment or return of the cargo (the whole quantity is kept)	independence inspection, administration inspection
Chocolate: Novipiu Pistacchio	Italy	aflatoxin (mycotoxin) 76µg/kg（B1: 68.5µg/kg, B2 : 7.9µg/kg）detected	Incidence of aflatoxin contamination is ubiquitous	Abandonment or return of the cargo (the whole quantity is kept)	independence inspection
Chocolate Pineapple Ball)	Thailand	violation of standard of use (sulfur dioxide 0.051g/kg detection)	Improper management	Abandonment or return of the cargo (the whole quantity is kept)	independence inspection
Chocolate: Dark Chocolate Enrobed Orange Sticks	UK	violation of standard of use (potassium sorbate (as sorbic acid) 0.396 g/kg detection)（use of potassium sorbate overuse for syrup、use of potassium sorbate in other than target food for orange peel as raw material)	Miscommunication between manufacturer and ingredient supplier	Abandonment or return of the cargo (the whole quantity is kept)	independence inspection, administration inspection
Chocolate（Pistachio & Honey（Honey & New Caramel Choc ＋ Pistachios Mini Slab 100g））	UK	aflatoxin (mycotoxin) 132µg/kg（B1: 125.2µg/kg、B2: 7.1µg/kg） detected	Not specified	Abandonment or return of the cargo (the whole quantity is kept)	ordered inspection
Biscuits: Flax Seed Biscuit	Pakistan	Cyanide 15mg/kg detection		Abandonment or return of the cargo (the whole quantity is kept)	independence inspection
Biscuits（Choco Rogo Rolled Wafer With Hazelnut Cream）	**Türkiye**	**undesignated additive (TBHQ 0.005 g/kg detection)**		**Abandonment or return of the cargo (the whole quantity is kept)**	**independence inspection**
		Article 13 of the Food Sanitation Act (2,4-dichlorophenoxyacetic acid 0.02 ppm detection)			
Green Mung Beans	Myanmar	violation of compositional standard (thiamethoxam 0.08 ppm detection)	Drift deposition	Abandonment or return of the cargo (the whole quantity is kept	ordered inspection
Candy (MICRO RAINBOW)	South Africa	undesignated additive (use of quinoline yellow)	Wrong raw material, insufficient production control	Abandonment	independence inspection
Candy (MINI CANES)	South Africa	undesignated additive (use of quinoline yellow)	Wrong raw material,	Abandonment	independence inspection

Item	Country	Contents of violation	Cause of violation	Disposal of the cargo	Remarks
Protein Musli Vegan	Germany	cyanide 17mg/kg detection	Lack of understanding of Japanese food safety standards	Abandonment or return of the cargo (the whole quantity is kept)	independence inspection
Soy Protein (Chicosoy Devilled Chicken 90g)	Sri Lanka	violation of standard of use（sodium benzoate 42.37g/kg use (use of sodium benzoate overuse for dough as raw material, use of potassium sorbate in other than target food)	Shipped goods that were not originally intended to be shipped to Japan	Abandonment or return of the cargo (the whole quantity is kept)	administration inspection
Chocolate (Assorted Pack)	Estonia	undesignated additive (azorubine detection, brilliant black)	Use of raw materials intended for foods exported to other countries	Abandonment or return of the cargo (the whole quantity is kept)	independence inspection, administration inspection
Chocolate: Novipiu Pistacchio	Italy	aflatoxin (mycotoxin) 76μg/kg（B1: 68.5μg/kg, B2 : 7.9μg/kg）detected	Incidence of aflatoxin contamination is ubiquitous	Abandonment or return of the cargo (the whole quantity is kept)	independence inspection
Chocolate Pineapple Ball)	Thailand	violation of standard of use (sulfur dioxide 0.051g/kg detection)	Improper management	Abandonment or return of the cargo (the whole quantity is kept)	independence inspection
Chocolate: Dark Chocolate Enrobed Orange Sticks	UK	violation of standard of use (potassium sorbate (as sorbic acid) 0.396 g/kg detection)（use of potassium sorbate overuse for syrup、use of potassium sorbate in other than target food for orange peel as raw material)	Miscommunication between manufacturer and ingredient supplier	Abandonment or return of the cargo (the whole quantity is kept)	independence inspection, administration inspection
Chocolate（Pistachio & Honey（Honey & New Caramel Choc + Pistachios Mini Slab 100g））	UK	aflatoxin (mycotoxin) 132μg/kg（B1: 125.2μg/kg、B2: 7.1μg/kg） detected	Not specified	Abandonment or return of the cargo (the whole quantity is kept)	ordered inspection
Biscuits: Flax Seed Biscuit	Pakistan	Cyanide 15mg/kg detection		Abandonment or return of the cargo (the whole quantity is kept)	independence inspection
Biscuits（Choco Rogo Rolled Wafer With Hazelnut Cream）	**Türkiye**	**undesignated additive (TBHQ 0.005 g/kg detection)**		**Abandonment or return of the cargo (the whole quantity is kept)**	**independence inspection**
			insufficient production control		
Candy（FLYING UNICORN LOLLIPOPS(PURPLE +BLUE))	China	undesignated additive (azorubine detection)	Contamination partly through transport	Abandonment or return of the cargo (the whole quantity is kept	independence inspection
Candy（FLYING UNICORN LOLLIPOPS(BLUE+RED))	China	undesignated additive (azorubine detection)	Contamination partly through transport	Abandonment or return of the cargo (the whole quantity is kept	independence inspection
Candy（FLYING UNICORN	China	undesignated additive (azorubine detection)	Contamination partly through transport	Abandonment or return of the cargo (the whole quantity is kept	independence inspection

Item	Country	Contents of violation	Cause of violation	Disposal of the cargo	Remarks
Protein Musli Vegan	Germany	cyanide 17mg/kg detection	Lack of understanding of Japanese food safety standards	Abandonment or return of the cargo (the whole quantity is kept)	independence inspection
Soy Protein (Chicosoy Devilled Chicken 90g)	Sri Lanka	violation of standard of use（sodium benzoate 42.37g/kg use (use of sodium benzoate overuse for dough as raw material, use of potassium sorbate in other than target food)	Shipped goods that were not originally intended to be shipped to Japan	Abandonment or return of the cargo (the whole quantity is kept)	administration inspection
Chocolate (Assorted Pack)	Estonia	undesignated additive (azorubine detection, brilliant black)	Use of raw materials intended for foods exported to other countries	Abandonment or return of the cargo (the whole quantity is kept)	independence inspection, administration inspection
Chocolate: Novipiu Pistacchio	Italy	aflatoxin (mycotoxin) 76μg/kg（B1: 68.5μg/kg, B2 : 7.9μg/kg）detected	Incidence of aflatoxin contamination is ubiquitous	Abandonment or return of the cargo (the whole quantity is kept)	independence inspection
Chocolate Pineapple Ball)	Thailand	violation of standard of use (sulfur dioxide 0.051g/kg detection)	Improper management	Abandonment or return of the cargo (the whole quantity is kept)	independence inspection
Chocolate: Dark Chocolate Enrobed Orange Sticks	UK	violation of standard of use (potassium sorbate (as sorbic acid) 0.396 g/kg detection)（use of potassium sorbate overuse for syrup、use of potassium sorbate in other than target food for orange peel as raw material)	Miscommunication between manufacturer and ingredient supplier	Abandonment or return of the cargo (the whole quantity is kept)	independence inspection, administration inspection
Chocolate（Pistachio & Honey（Honey & New Caramel Choc ＋ Pistachios Mini Slab 100g））	UK	aflatoxin (mycotoxin) 132μg/kg（B1: 125.2μg/kg、B2: 7.1μg/kg） detected	Not specified	Abandonment or return of the cargo (the whole quantity is kept)	ordered inspection
Biscuits: Flax Seed Biscuit	Pakistan	Cyanide 15mg/kg detection		Abandonment or return of the cargo (the whole quantity is kept)	independence inspection
Biscuits（Choco Rogo Rolled Wafer With Hazelnut Cream)	**Türkiye**	**undesignated additive (TBHQ 0.005 g/kg detection)**		**Abandonment or return of the cargo (the whole quantity is kept)**	**independence inspection**
LOLLIPOPS(YELLOW+RED))					
Carob Bean Gum	Italy	violation of compositional standard (purity（1）:protein 7.8%)	Failure to inspect during manufacturing	Return of the cargo	independence inspection
Seasoning: Capsaicin Sauce	Korea	violation of standard of use（polysorbate 7.6 g/kg detection)	Lack of understanding of use standard	Abandonment or return of the cargo (the whole quantity is kept	independence inspection
Seasoning: PHO BO	Vietnam	violation of standard of use（acesulfame potassium 0.45 g/kg detection)	Erroneous delivery (product intended for domestic use at exporting country)	Abandonment or return of the cargo (the whole quantity is kept	independence inspection

Item	Country	Contents of violation	Cause of violation	Disposal of the cargo	Remarks
Protein Musli Vegan	Germany	cyanide 17mg/kg detection	Lack of understanding of Japanese food safety standards	Abandonment or return of the cargo (the whole quantity is kept)	independence inspection
Soy Protein (Chicosoy Devilled Chicken 90g)	Sri Lanka	violation of standard of use（sodium benzoate 42.37g/kg use (use of sodium benzoate overuse for dough as raw material, use of potassium sorbate in other than target food)	Shipped goods that were not originally intended to be shipped to Japan	Abandonment or return of the cargo (the whole quantity is kept)	administration inspection
Chocolate (Assorted Pack)	Estonia	undesignated additive (azorubine detection, brilliant black)	Use of raw materials intended for foods exported to other countries	Abandonment or return of the cargo (the whole quantity is kept)	independence inspection, administration inspection
Chocolate: Novipiu Pistacchio	Italy	aflatoxin (mycotoxin) 76μg/kg（B1: 68.5μg/kg, B2 : 7.9μg/kg）detected	Incidence of aflatoxin contamination is ubiquitous	Abandonment or return of the cargo (the whole quantity is kept)	independence inspection
Chocolate Pineapple Ball)	Thailand	violation of standard of use (sulfur dioxide 0.051g/kg detection)	Improper management	Abandonment or return of the cargo (the whole quantity is kept)	independence inspection
Chocolate: Dark Chocolate Enrobed Orange Sticks	UK	violation of standard of use (potassium sorbate (as sorbic acid) 0.396 g/kg detection)（use of potassium sorbate overuse for syrup、use of potassium sorbate in other than target food for orange peel as raw material)	Miscommunication between manufacturer and ingredient supplier	Abandonment or return of the cargo (the whole quantity is kept)	independence inspection, administration inspection
Chocolate（Pistachio & Honey（Honey & New Caramel Choc ＋ Pistachios Mini Slab 100g））	UK	aflatoxin (mycotoxin) 132μg/kg（B1: 125.2μg/kg、B2: 7.1μg/kg） detected	Not specified	Abandonment or return of the cargo (the whole quantity is kept)	ordered inspection
Biscuits: Flax Seed Biscuit	Pakistan	Cyanide 15mg/kg detection		Abandonment or return of the cargo (the whole quantity is kept)	independence inspection
Biscuits（Choco Rogo Rolled Wafer With Hazelnut Cream)	**Türkiye**	**undesignated additive (TBHQ 0.005 g/kg detection)**		**Abandonment or return of the cargo (the whole quantity is kept)**	**independence inspection**
Seasoning: Chili Sauce	Taiwan	violation of standard of use（potassium sorbate (as sorbic acid) 0.562 g/kg, acesulfame potassium 2.80 g/kg detection)	Insufficient prior confirmation	Abandonment or return of the cargo (the whole quantity is kept	independence inspection
Container packing filling pressurization heating sterilization food: SOUP PACKET	China	violation of compositional standard (live bacteria positive)	Incorrect description in manufacturing process chart. Insufficient prior confirmation	Abandonment or return of the cargo (the whole quantity is kept	independence inspection

Item	Country	Contents of violation	Cause of violation	Disposal of the cargo	Remarks
Protein Musli Vegan	Germany	cyanide 17mg/kg detection	Lack of understanding of Japanese food safety standards	Abandonment or return of the cargo (the whole quantity is kept)	independence inspection
Soy Protein (Chicosoy Devilled Chicken 90g)	Sri Lanka	violation of standard of use（sodium benzoate 42.37g/kg use (use of sodium benzoate overuse for dough as raw material, use of potassium sorbate in other than target food)	Shipped goods that were not originally intended to be shipped to Japan	Abandonment or return of the cargo (the whole quantity is kept)	administration inspection
Chocolate (Assorted Pack)	Estonia	undesignated additive (azorubine detection, brilliant black)	Use of raw materials intended for foods exported to other countries	Abandonment or return of the cargo (the whole quantity is kept)	independence inspection, administration inspection
Chocolate: Novipiu Pistacchio	Italy	aflatoxin (mycotoxin) 76μg/kg（B1: 68.5μg/kg, B2 : 7.9μg/kg）detected	Incidence of aflatoxin contamination is ubiquitous	Abandonment or return of the cargo (the whole quantity is kept)	independence inspection
Chocolate Pineapple Ball)	Thailand	violation of standard of use (sulfur dioxide 0.051g/kg detection)	Improper management	Abandonment or return of the cargo (the whole quantity is kept)	independence inspection
Chocolate: Dark Chocolate Enrobed Orange Sticks	UK	violation of standard of use (potassium sorbate (as sorbic acid) 0.396 g/kg detection) (use of potassium sorbate overuse for syrup、use of potassium sorbate in other than target food for orange peel as raw material)	Miscommunication between manufacturer and ingredient supplier	Abandonment or return of the cargo (the whole quantity is kept)	independence inspection, administration inspection
Chocolate（Pistachio & Honey（Honey & New Caramel Choc ＋ Pistachios Mini Slab 100g））	UK	aflatoxin (mycotoxin) 132μg/kg（B1: 125.2μg/kg、B2: 7.1μg/kg） detected	Not specified	Abandonment or return of the cargo (the whole quantity is kept)	ordered inspection
Biscuits: Flax Seed Biscuit	Pakistan	Cyanide 15mg/kg detection		Abandonment or return of the cargo (the whole quantity is kept)	independence inspection
Biscuits（Choco Rogo Rolled Wafer With Hazelnut Cream)	**Türkiye**	**undesignated additive (TBHQ 0.005 g/kg detection)**		**Abandonment or return of the cargo (the whole quantity is kept)**	**independence inspection**
Container packing filling pressurization heating sterilization food: Soup/Stew（DAL TADKA)	India	violation of compositional standard (live bacteria positive)	Not specified	Abandonment or return of the cargo (the whole quantity is kept	independence inspection
Mix Dal With Toor Dal	India	detection over the amount unlikely to cause damage to human health that the provision of Paragraph 3, Article 13 of the Food Sanitation Act (chlorpyrifos 0.05 ppm detection)		Abandonment or return of the cargo (the whole quantity is kept	ordered inspection

Item	Country	Contents of violation	Cause of violation	Disposal of the cargo	Remarks
Protein Musli Vegan	Germany	cyanide 17mg/kg detection	Lack of understanding of Japanese food safety standards	Abandonment or return of the cargo (the whole quantity is kept)	independence inspection
Soy Protein (Chicosoy Devilled Chicken 90g)	Sri Lanka	violation of standard of use（sodium benzoate 42.37g/kg use (use of sodium benzoate overuse for dough as raw material, use of potassium sorbate in other than target food)	Shipped goods that were not originally intended to be shipped to Japan	Abandonment or return of the cargo (the whole quantity is kept)	administration inspection
Chocolate (Assorted Pack)	Estonia	undesignated additive (azorubine detection, brilliant black)	Use of raw materials intended for foods exported to other countries	Abandonment or return of the cargo (the whole quantity is kept)	independence inspection, administration inspection
Chocolate: Novipiu Pistacchio	Italy	aflatoxin (mycotoxin) 76μg/kg（B1: 68.5μg/kg, B2 : 7.9μg/kg）detected	Incidence of aflatoxin contamination is ubiquitous	Abandonment or return of the cargo (the whole quantity is kept)	independence inspection
Chocolate Pineapple Ball)	Thailand	violation of standard of use (sulfur dioxide 0.051g/kg detection)	Improper management	Abandonment or return of the cargo (the whole quantity is kept)	independence inspection
Chocolate: Dark Chocolate Enrobed Orange Sticks	UK	violation of standard of use (potassium sorbate (as sorbic acid) 0.396 g/kg detection)（use of potassium sorbate overuse for syrup、use of potassium sorbate in other than target food for orange peel as raw material）	Miscommunication between manufacturer and ingredient supplier	Abandonment or return of the cargo (the whole quantity is kept)	independence inspection, administration inspection
Chocolate（Pistachio & Honey（Honey & New Caramel Choc ＋ Pistachios Mini Slab 100g））	UK	aflatoxin (mycotoxin) 132μg/kg（B1: 125.2μg/kg、B2: 7.1μg/kg） detected	Not specified	Abandonment or return of the cargo (the whole quantity is kept)	ordered inspection
Biscuits: Flax Seed Biscuit	Pakistan	Cyanide 15mg/kg detection		Abandonment or return of the cargo (the whole quantity is kept)	independence inspection
Biscuits（Choco Rogo Rolled Wafer With Hazelnut Cream）	**Türkiye**	**undesignated additive (TBHQ 0.005 g/kg detection)**		**Abandonment or return of the cargo (the whole quantity is kept)**	**independence inspection**
Mix Dal	India	detection over the amount unlikely to cause damage to human health that the provision of Paragraph 3, Article 13 of the Food Sanitation Act (chlorpyrifos 0.05 ppm detection)		Abandonment or return of the cargo (the whole quantity is kept	ordered inspection
Roasted Quinoa Puffs & Seeds Peri Peri)	India	undesignated additive (TBHQ 4μg/g detection)	Insufficient cleaning and sanitation of production equipment	Abandonment or return of the cargo (the whole quantity is kept	independence inspection
Condensed Creamer Purple Yam Flavor)	Philippines	undesignated additive (azorubine detection)	Insufficient cleaning and sanitation of	Abandonment or return of the cargo	independence inspection

Item	Country	Contents of violation	Cause of violation	Disposal of the cargo	Remarks
Protein Musli Vegan	Germany	cyanide 17mg/kg detection	Lack of understanding of Japanese food safety standards	Abandonment or return of the cargo (the whole quantity is kept)	independence inspection
Soy Protein (Chicosoy Devilled Chicken 90g)	Sri Lanka	violation of standard of use（sodium benzoate 42.37g/kg use (use of sodium benzoate overuse for dough as raw material, use of potassium sorbate in other than target food)	Shipped goods that were not originally intended to be shipped to Japan	Abandonment or return of the cargo (the whole quantity is kept)	administration inspection
Chocolate (Assorted Pack)	Estonia	undesignated additive (azorubine detection, brilliant black)	Use of raw materials intended for foods exported to other countries	Abandonment or return of the cargo (the whole quantity is kept)	independence inspection, administration inspection
Chocolate: Novipiu Pistacchio	Italy	aflatoxin (mycotoxin) 76μg/kg（B1: 68.5μg/kg, B2 : 7.9μg/kg）detected	Incidence of aflatoxin contamination is ubiquitous	Abandonment or return of the cargo (the whole quantity is kept)	independence inspection
Chocolate Pineapple Ball)	Thailand	violation of standard of use (sulfur dioxide 0.051g/kg detection)	Improper management	Abandonment or return of the cargo (the whole quantity is kept)	independence inspection
Chocolate: Dark Chocolate Enrobed Orange Sticks	UK	violation of standard of use (potassium sorbate (as sorbic acid) 0.396 g/kg detection)（use of potassium sorbate overuse for syrup、use of potassium sorbate in other than target food for orange peel as raw material）	Miscommunication between manufacturer and ingredient supplier	Abandonment or return of the cargo (the whole quantity is kept)	independence inspection, administration inspection
Chocolate（Pistachio & Honey（Honey & New Caramel Choc ＋ Pistachios Mini Slab 100g））	UK	aflatoxin (mycotoxin) 132μg/kg（B1: 125.2μg/kg、B2: 7.1μg/kg） detected	Not specified	Abandonment or return of the cargo (the whole quantity is kept)	ordered inspection
Biscuits: Flax Seed Biscuit	Pakistan	Cyanide 15mg/kg detection		Abandonment or return of the cargo (the whole quantity is kept)	independence inspection
Biscuits（Choco Rogo Rolled Wafer With Hazelnut Cream）	**Türkiye**	**undesignated additive (TBHQ 0.005 g/kg detection)**		**Abandonment or return of the cargo (the whole quantity is kept)**	**independence inspection**
			manufacturing equipment	(the whole quantity is kept	
Roasted Bajra Mix Desi Spicy	India	undesignated additive (TBHQ 1μg/g detection)	Insufficient cleaning and sanitation of production equipment	Abandonment or return of the cargo (the whole quantity is kept	independence inspection
Protein Musli Vegan)	Germany	cyanide 17mg/kg detection	Lack of knowledge of Japanese food safety standards	Abandonment or return of the cargo (the whole quantity is kept	independence inspection
Bajra Puff	India	aflatoxin (mycotoxin) 14μg/kg（B1: 12.3μg/kg、B2: 1.3μg/kg）detected	Inadequate sorting, inadequate storage temperatures	Abandonment or return of the cargo (the whole quantity is kept	monitoring inspection

Item	Country	Contents of violation	Cause of violation	Disposal of the cargo	Remarks
Protein Musli Vegan	Germany	cyanide 17mg/kg detection	Lack of understanding of Japanese food safety standards	Abandonment or return of the cargo (the whole quantity is kept)	independence inspection
Soy Protein (Chicosoy Devilled Chicken 90g)	Sri Lanka	violation of standard of use（sodium benzoate 42.37g/kg use (use of sodium benzoate overuse for dough as raw material, use of potassium sorbate in other than target food)	Shipped goods that were not originally intended to be shipped to Japan	Abandonment or return of the cargo (the whole quantity is kept)	administration inspection
Chocolate (Assorted Pack)	Estonia	undesignated additive (azorubine detection, brilliant black)	Use of raw materials intended for foods exported to other countries	Abandonment or return of the cargo (the whole quantity is kept)	independence inspection, administration inspection
Chocolate: Novipiu Pistacchio	Italy	aflatoxin (mycotoxin) 76μg/kg（B1: 68.5μg/kg, B2 : 7.9μg/kg）detected	Incidence of aflatoxin contamination is ubiquitous	Abandonment or return of the cargo (the whole quantity is kept)	independence inspection
Chocolate Pineapple Ball)	Thailand	violation of standard of use (sulfur dioxide 0.051g/kg detection)	Improper management	Abandonment or return of the cargo (the whole quantity is kept)	independence inspection
Chocolate: Dark Chocolate Enrobed Orange Sticks	UK	violation of standard of use (potassium sorbate (as sorbic acid) 0.396 g/kg detection)（use of potassium sorbate overuse for syrup、use of potassium sorbate in other than target food for orange peel as raw material）	Miscommunication between manufacturer and ingredient supplier	Abandonment or return of the cargo (the whole quantity is kept)	independence inspection, administration inspection
Chocolate （Pistachio & Honey （Honey & New Caramel Choc + Pistachios Mini Slab 100g））	UK	aflatoxin (mycotoxin) 132μg/kg（B1: 125.2μg/kg、B2: 7.1μg/kg） detected	Not specified	Abandonment or return of the cargo (the whole quantity is kept)	ordered inspection
Biscuits: Flax Seed Biscuit	Pakistan	Cyanide 15mg/kg detection		Abandonment or return of the cargo (the whole quantity is kept)	independence inspection
Biscuits （Choco Rogo Rolled Wafer With Hazelnut Cream）	**Türkiye**	**undesignated additive (TBHQ 0.005 g/kg detection)**		**Abandonment or return of the cargo (the whole quantity is kept)**	**independence inspection**
Barley	Australia	nasty smell, decay and generation of mold	Defective hatch covers	Abandonment or return of the cargo (the whole quantity is kept	administration inspection
Barley	Australia	generation of mold, solidification, discoloration, nasty smell		Abandonment or return of the cargo (the whole quantity is kept	administration inspection

◆**FY2024**

Item	Country	Contents of violation	Cause of violation	Disposal of the cargo	Remarks
chocolate: SANICKA	Thailand	aflatoxin (mycotoxin) 27μg/kg（B1: 22.5μg/kg、B2: 4.5μg/kg） detected	Inadequate sorting	Abandonment or return of the cargo (the whole quantity is kept	ordered inspection
Health food: DR.DIET SEASON 2 PROTEIN SHAKE-CHOCOLASTE 10PCS	Korea	violation of standard of use（sucralose 1.5 g/kg detection）		Abandonment or return of the cargo (the whole quantity is kept	independence inspection
Dried noodle: LAZZAT COLORED VERMICELLI	Pakistan	undesignated additive（use of azorubine）、violation of standard of use (use of Food Red No.40,Food Blue No.1,Food Yellow No.4,Food Yellow No.5 in other than target food)		Abandonment or return of the cargo (the whole quantity is kept	independence inspection
Green mung beans	Myanmar	violation of compositional standard (thiamethoxam 0.08 ppm detection)		Abandonment or return of the cargo (the whole quantity is kept	ordered inspection
MIX DAL	India	detection over the amount unlikely to cause damage to human health that the provision of Paragraph 3 , Article 13 of the Food Sanitation Act (chlorpyrifos 0.04 ppm detection)		Abandonment or return of the cargo (the whole quantity is kept	ordered inspection
Seasoning: MAM RUOC HUE	Vietnam	undesignated additive (cyclamate 10μg/g detection)	Used in raw materials	Abandonment or return of the cargo (the whole quantity is kept)	independence inspection
Container packing filling pressurization heating sterilization food:(MARINATED LEMONGRASS GRILLING SAUCE)	Vietnam	violation of compositional standard (live bacteria positive)		Abandonment or return of the cargo (the whole quantity is kept	independence inspection
Container packing filling pressurization heating sterilization food:(MARINATED CHAR SIU SAUCE)	Vietnam	violation of compositional standard (live bacteria positive)		Abandonment or return of the cargo (the whole quantity is kept	independence inspection
Container packing filling pressurization heating sterilization food:(MARINATED BRAISED CHICKEN WITH GINGER SAUCE)	Vietnam	violation of compositional standard (live bacteria positive)		Abandonment or return of the cargo (the whole quantity is kept	independence inspection
Frozen food served without heating:（Frozen atemoya puree)	Taiwan	violation of compositional standard (coliform bacteria positive)	Not specified	Abandonment or return of the cargo (the whole quantity is kept)	independence inspection
Seasoning: INSTANT SALTED SHRIMP PASTE	Vietnam	violation of standard of use（acesulfame potassium 0.70 g/kg detection）	Lack of knowledge of Japanese Food Sanitation Act	Abandonment or return of the cargo (the whole quantity is kept	independence inspection

Item	Country	Contents of violation	Cause of violation	Disposal of the cargo	Remarks
Seasoning: Fried Rice Sauce	Cambodia	violation of standard of use（sorbic acid 0.04 g/kg detection（use of sorbic acid 0.81g/kg for Ketchup as raw material）、use of sodium benzoate in other than target food(used for Ketchup））	Insufficient prior confirmation	Abandonment	monitoring inspection administration inspection
Soup: Beef Stew Paste	Cambodia	violation of standard of use（sorbic acid 0.03 g/kg detection（use of sorbic acid 0.81g/kg for Ketchup as raw material））	Insufficient prior confirmation	Abandonment	monitoring inspection
Soup: CHICKEN SOUP MIX	Brazil	undesignated additive (use of ferrous fumarate, iodized salt)		Abandonment or return of the cargo (the whole quantity is kept)	administration inspection
Frozen food served without heating: SOY SAUCE (GANJANG GEJANG SAUCE)	Korea	violation of compositional standard (coliform bacteria positive)		Abandonment or return of the cargo (the whole quantity is kept	independence inspection
Frozen food served after heating(other than those heated immediately before freezing):（FROZEN ONION SLICE)	China	violation of compositional standard (thiamethoxam 0.04 ppm detection)		Abandonment or return of the cargo (the whole quantity is kept)	ordered inspection
Soup : Mistura Para Creme De Cebola / Onion Cream Mix)	Brazil	violation of standard of manufacture (radiation exposure)		Abandonment or return of the cargo (the whole quantity is kept)	administration inspection
Mixed spices（TEMPERO BAIANO / BAIANO SEASONING)	Brazil	undesignated additive (Ferrous fumarate 2μg/g detection)		Abandonment or return of the cargo (the whole quantity is kept)	administration inspection
Korean Bean Paste	Taiwan	violation of standard of use （polysorbate 800.022g/kg)		Abandonment or return of the cargo (the whole quantity is kept)	administration inspection
Frozen food served without heating : MACARONS（EARL GREY MILKTEA)	Korea	violation of compositional standard (coliform bacteria positive)		Abandonment or return of the cargo (the whole quantity is kept)	independence inspection
Frozen food served without heating: MACARONS（MATCHE BROWNIE)	Korea	violation of compositional standard (coliform bacteria positive)		Abandonment or return of the cargo (the whole quantity is kept)	independence inspection
Container packing filling pressurization heating sterilization food : (Sweet potato porridge)	Korea	violation of standard of manufacture (Container sealing)		Abandonment or return of the cargo (the whole quantity is kept)	administration inspection

Item	Country	Contents of violation	Cause of violation	Disposal of the cargo	Remarks
Container packing filling pressurization heating sterilization food : (Sweet pumpkin porridge)	Korea	violation of standard of manufacture (Container sealing)		Abandonment or return of the cargo (the whole quantity is kept)	administration inspection
Container packing filling pressurization heating sterilization food : (Chicken breast porridge)	Korea	violation of standard of manufacture (Container sealing)		Abandonment or return of the cargo (the whole quantity is kept)	administration inspection
Container packing filling pressurization heating sterilization food : (Black been porridge)	Korea	violation of standard of manufacture (Container sealing)		Abandonment or return of the cargo (the whole quantity is kept)	administration inspection
Barley	US	nasty smell, generation of mold, deterioration, discoloration, solidification	Cargo damage due to wetting (defective container hatch covers)	Abandonment or return of the cargo (the whole quantity is kept)	administration inspection

HUBUBAT, BAKLİYAT, YAĞLI TOHUMLAR VE MAMULERİ SEKTÖRÜ

JAPONYA'YA YÖNELİK PAZAR ARAŞTIRMASI RAPORU YÖNETİCİ ÖZETİ

OCAK 2025

YÖNETİCİ ÖZETİ

Projenin amacı, Japonya'ya ihracatı teşvik etmek amacıyla Hububat, Bakliyat, Yağlı Tohumlar ve Mamulleri İhracatçı Birlikleri üyelerine, Japonya'daki hedef ürünlere ilişkin pazarlama bilgilerini derlemek ve Japonya'ya ürün ihracatı konusunda pratik rehberlik sağlamak suretiyle destek sağlamaktır.

Hububat, Bakliyat, Yağlı Tohumlar ve Mamulleri sektöründe Türkiye'nin Japonya'ya ihraç ettiği veya ihracat potansiyeli yüksek olan aşağıdaki 12 ürün grubu belirlenmiş ve bu araştırma söz konusu ürünler bazında yapılmıştır.

Hedef Ürünler	**GTİP**
1. Protein ve Gıda Takviyeleri (Protein Konsantreleri, Diyet Mamaları, Jöleler, Bitkisel Bazlı Etler)	2106
2. Çikolata	1806
3. Bisküvi, Kek, Pasta, Ekmek, Pirinçten Atıştırmalık	1905
4. Makarna (Noodle, Spagetti, Şehriye, Lazanya, Kuskus dahil)	1902
5. Soslar ve Hardal	2103
6. Kuru Bakliyat	0713
7. Bitkisel Sıvı Yağlar ve Margarin	1512 1515 1517
8. Şekerleme	1704
9. Mısırı Gevreği ve Kahvaltılık Tahıllar	1104
10. Çorbalar, Et Suları	2104
11. Bulgur ve Bulgur Pilavı (pişirilmiş)	1904.30 1904.90
12. Evcil Hayvan Maması	2308 2309

Rapor, aşağıdaki başlıkları içermektedir:

I. Japonya'daki Gıda Pazarına Genel Bakış

1. Gıda ürünleri dağıtımının yapısı
2. Gıda sanayinin pazar büyüklüğü ve pazar yapılandırması

II. Hedef ürünlere ilişkin pazar raporu

1. Her bir ürün için pazar büyüklüğü:
   . Pazar büyüklüğü geçişi ve tahmini (değere göre, 2018 mali yılından 2027 mali yılına kadar)
   . Toplam ithalat büyüklüğü, ülkeye göre ithalat büyüklüğü (HS-Koduna göre, 2018 mali yılından 2023 mali yılına kadar, değer ve hacim)

2. Japonya'ya ihracat hakkında bilgi
   . İthalat vergisi (HS-Koduna göre)
   . İlgili yasal sistemler, düzenlemeler

3. Pazar Bilgisi
   . Son yıllardaki pazar eğilimleri
   . Dağıtım, satış kanalı
   . Yerli ürünlerin ve ithal ürünlerin konumlandırılması.
   . Başlıca ürünlerin ve en çok satan ürünlerin özellikleri (ürün/marka adı, fiyat, konteyner başına hacim, paket, satış kanalı, ürün özelliği)
   . Başlıca İthalatçıların Profilleri (2 ila 3 şirket) (Şirket adı, konum, temel bilgiler ve işinin ana hatları, vb.)

Bu kapsamda hazırlanan rapora ait özet bilgiler aşağıda yer almaktadır.

1. Protein ve Gıda Takviyeleri (Protein Konsantreleri, Diyet Mamaları, Jöleler, Bitkisel Bazlı Etler)

Japonya'da, aktif yaşlanma ve yaşlanmayı önleyici bakım konularına artan ilgi nedeniyle sağlık ve güzellik için tüketilen gıdalara olan talep artmaktadır. Genişlemekte olan besin takviyeleri pazarında, Mart 2024'te meydana gelen bir sağlık tehlikesi olayı sonrasında tüketici güveninde yaşanan düşüş nedeniyle daralma beklenmektedir. Öte yandan, spora olan ilginin artması ve kas gücünü korumak isteyen yaşlı bireylerin talebi sayesinde protein pazarı güçlü kalmaya devam etmektedir. Düşük giriş engelleri nedeniyle protein tozları segmentinde yoğun bir rekabet mevcutken, Japon üreticiler içecekler ve barlar segmentinde hakim konumdadır. Yurtdışı markaları ise özellikle daha genç tüketiciler arasında e-ticaret yoluyla varlıklarını artırmaktadır.

2. Çikolata

Japonya'da çikolata satışları sıcak ve nemli yaz ayları sonrasında sonbahar ve kış aylarında zirve yapmaktadır. Üreticiler yıl boyu satışları dengelemek için fırınlanmış ürünler ve içecekler gibi çikolata bazlı şekerlemelerin tanıtımına ağırlık vermektedir. Pazar, birinci sınıf hediyelik çikolatalar (örneğin GODIVA) ve süpermarketlerde satılan ortalama çikolatalar olarak ikiye bölünmüş durumdadır.

Sevgililer Günü, ofis hediyelerinden bireysel hediye alma alışverişlerine geçiş, hediye çikolata pazarını yönlendirmektedir. Yükselen kakao fiyatları ve 2023 yılının sonlarından bu yana zayıflayan Yen, üreticileri daha az çikolata içeren ürünler geliştirmeye zorlamıştır. İthal çikolata satışları yüksek fiyatlar nedeniyle durgun kalmaya devam ederken ödüllü lüks markalar sadık tüketicilerini çekmeye devam etmektedir.

3. Bisküvi, Kek, Pasta, Ekmek, Pirinçten Atıştırmalık

Bisküvi pazarı da süpermarketlerde satılan premium hediyelik bisküviler ve daha büyük paya sahip düşük fiyatlı bisküvileri arasında bölünmüş durumdadır. Premium hediyelik bisküvilerdeki popüler ürünler, dekoratif kutulardaki kurabiyeler ve “langue de chat” (kedi dili) gibi hediyelik eşyalardır. Süpermarketlerde satılan bisküviler arasında çikolata kaplı bisküviler, saf çikolata ürünlerinden daha ucuz oldukları için popülerdir. "Walkers" gibi ithal bisküviler, uyumsuz ürün boyutları ve ambalaj tercihleri nedeniyle küçük bir pazar payına sahiptir.

4. Makarna (Noodle, Spagetti, Şehriye, Lazanya, Kuskus dahil)

Japonya'nın makarna pazarı birim fiyatların yükselmesiyle birlikte büyümektedir. Hızlı pişirilen ve dondurulmuş makarna gibi zamandan tasarruf sağlayan ürünlere olan talep, öğünlük porsiyonlar ve yeniden kapatılabilir ambalajlarla birlikte artmaktadır. Kurutulmuş makarna ve sosları da acil durum stok gıdaları olarak değerlendirilmektedir. Gıda işletmeleri işgücü eksikliklerini gidermek için mikrodalgada pişirilebilen dondurulmuş makarnayı tercih etmektedir. Makarna çoğunlukla süpermarketlerde ve ithal gıda mağazalarında satılmaktadır. En çok ithalat yapılan ülke olan İtalya, makarnada pazara hakim durumdadır. 2028 yılına kadar tarifeleri sıfıra indiren Japonya-AB İşbirliği Anlaşması EPA'nın İtalyan makarnasının Japonya'daki varlığını artırması beklenmektedir. Türk makarnası ise %2'lik küçük bir pazar payına sahiptir.

5. Soslar ve Hardal

Japonya'da sos ve hardal satışları, sağlıklı ürünler ve lezzet çeşitliliği sayesinde istikrarlı bir şekilde artmaktadır. Kaliteyi koruyan kaplar ve çoklu boyut seçenekleri gibi ambalajlamadaki yenilikler, çeşitli ev ihtiyaçlarını karşılamaktadır. Yerli markalar günlük kullanım sos pazarına hakimken, ithal ürünler çoğunlukla Çin, Kore ve diğer uluslararası yemekler gibi etnik mutfaklar için kullanılmaktadır. Bu ithal ürünler genellikle ithal gıda satan mağazalarda satılırken sınırlı olarak büyük süpermarketlerde de bulunmaktadır.

6. Kuru Bakliyat

Japonya adzuki ve Meksika fasulyeleri talebinin yaklaşık yarısını ithal etmektedir ve arzı, tarife kotası sistemiyle yönetmektedir. Genç nesiller çoğunlukla yaşlılar tarafından tüketilen geleneksel wagashi yerine Batı tatlarını tercih ettikçe bakliyat talebi azalmaktadır. Adzuki fasulyeleri wagashi için popülerliğini korurken, Myanmar ve ABD'den gelen lima fasulyeleri, beyaz fasulye ezmesi için kullanılmaktadır, ancak gıda güvenliği yasaları nedeniyle üreticilerle sınırlı kalmaktadır. Geleneksel haşlanmış fasulyelerin tüketimi de azalırken, nohut ve mercimeğe olan talebin genç nesiller arasında artması beklenmektedir.

7. Bitkisel Sıvı Yağlar ve Margarin

Japonya'nın bitkisel sıvı yağ ve margarin pazarı enflasyon nedeniyle değer olarak artmaktadır ve çok yönlü ve birinci sınıf yağlara olan talep güçlü konumdadır. Yağların yaklaşık %50'si gıda işleme, %30'u gıda hizmetleri ve %20'si evlerde kullanılmaktadır. Yerli markalar pazara hakimken, zeytin ve üzüm çekirdeği gibi ithal yağlar sağlık bilincine sahip tüketicilere hitap etmektedir. İthalat miktar olarak bir miktar düşerken artan lojistik maliyetleri, enerji fiyatları ve jeopolitik faktörler fiyatları yükseltmektedir. Margarin talebi ticari kullanım için sabit kalırken evlerde azalmaktadır.

8. Şekerleme

Sakızlı şekerler, Z kuşağının hem zengin aromalı yerli markalara hem de HARIBO gibi ithal markalara olan talebiyle yönlenen Japonya şekerleme pazarında büyüyen bir segmenttir. Sert şeker satışları pandemi sırasında düşerken 2022 yılında boğaz pastillerinde geçici bir toparlanma görülmüştür. 2025 yılından itibaren büyümede duraklama beklenmektedir. Sakız pazarı tüketicilerin rahatlık için naneli şekerleri tercih etmesi nedeniyle uzun süredir düşüşte iken karamel ve yumuşak şekere olan talep istikrarlı bir şekilde artmaktadır. Lotte ve Mondelēz Japan markaları küçülmekte olan sakız pazarına hakim durumdadır.

9. Mısırı Gevreği ve Kahvaltılık Tahıllar

Daha fazla insanın geleneksel pirinç veya hamur işi kahvaltılıklar yerine bisküvi veya protein shake'leri gibi atıştırmalıkları tercih etmesiyle birlikte Japonya'nın kahvaltı kültürü çeşitlenmektedir. 2012 yılından sonra patlama yapan granola, "üçüncü temel gıda" olarak pazarlanmış, 2016 yılında zirveye ulaşmıştır. Ancak sonrasında talep giderek düşmeye başlamıştır. COVID-19 salgını, insanların evde kalmasıyla kahvaltılık tahıl tüketimini kısa süreliğine canlandırmıştır. Yulaf ezmesinde de sağlık trendleri nedeniyle kısa süreli bir artış görülmüş ancak hazırlamanın zahmetli olması popülaritesini sınırlandırmıştır. Bu arada, yabancı turistlerin geri dönmesiyle birlikte otel kahvaltı büfelerinde kahvaltılık tahıllara olan talep artmaktadır.

10. Çorbalar, Et Suları, Konsantre Dashi*

**Japon mutfağında kullanılan bir çorba ve pişirme hammaddesi türüdür. Daşi; miso çorbası, net suyu, şehriye suyu ve birçok sıvı yemeğin temelini oluşturur.*

“Konsome” ve "dashi"ye olan talebin azalması ile birlikte Japonya'nın çorba ve et suyu piyasası stabil seyretmektedir. Ancak evde yemek pişirmenin de azalmasıyla birlikte hazır çorbalara ve kap çorbalara olan ilginin arttığı gözlemlenmektedir. Çin çorbaları ve sığır eti stokları için çoğunlukla Çin, Avustralya ve Yeni Zelanda'dan sınırlı olarak ithalat yapılırken yerli üreticiler pazara hakim durumdadır. Diğer ithal ürünler ithalat mağazaları ve mail-order siparişi hizmetleri aracılığıyla dağıtılırken “Maggi" ve "Campbell's" gibi yabancı markalar da süpermarketlerde satılmaktadır.

11. Bulgur ve Bulgur Pilavı (pişirilmiş)

Bulgur, Japonya'da düşük bilinirliğe ve küçük bir pazara sahiptir. Büyük ithal gıda mağazalarında ve süpermarketlerde ticari amaçlı olarak satılmaktadır. Bulgurun restoran menüleri ve yiyecek hizmeti işletmeleri aracılığıyla tanıtılması ile tanınırlığının artırabileceği düşünülmektedir. Pazarı büyütmek için Türk gıda ihracatçıların, ithalat toptancıları ve gıda perakendecileriyle iş birliği yapması gerekmekte olup pazarlama faaliyetleri de önemlidir.

12. Evcil Hayvan Maması

Japonya'nın evcil hayvan pazarı, küçük köpeklerin ve evde beslenen kedi sayısının artması ve sağlık bilincine sahip tüketicilerin bu ürünlere olan talebinin yükselişiyle yönlendirilmektedir. Evcil hayvan maması pazarı hacim olarak küçülmektedir, ancak birinci sınıf ve sağlık odaklı arz nedeniyle değer olarak artmaktadır. Kedi maması ve evcil hayvan mamaları önemli bir büyüme kaydetmiştir. MARS ve ROYAL CANIN gibi büyük yabancı markalar, büyük pazar paylarına sahiptir. Birçok evcil hayvan maması ithal edilmekte ve yeniden paketleme ve etiketleme ile yerel olarak yapılmaktadır. İhracatçıların yerel iştiraklere veya satış temsilcilerine ihtiyacı bulunmaktadır. Satış kanalları arasında perakende mağazaları ve büyüyen mail-order siparişi hizmetleri yer almaktadır. Birinci sınıf ürünler genellikle sunum yoluyla, düşük fiyatlı ürünler ise self servis olarak satılmaktadır.

Ürün Adı	**Pazar Büyüklüğü (2023) Birim: 1.000 USD**	**% Değişim (2018-2027)**	**Pazar Özellikleri ve Giriş Engelleri**
1. Protein ve Gıda Takviyeleri (Protein Konsantreleri, Diyet Mamaları, Jöleler Bitkisel Bazlı Etler)	5.952.683	-0,6	Genel olarak gıda takviyesi pazarındaki büyüme son yıllarda yavaşladı ve rekabet yoğunlaştı. Düşük fiyatlı ürünlerin ve sınır ötesi e-ticaret yoluyla Japonya'da bulunmayan ürünlerin akını nedeniyle yurtdışından gelen ürünler pazar payını artırmaktadır. Yurt içi pazarın büyümesine rağmen, düşük giriş bariyeri nedeniyle pazara giren firma sayısının artması, ayrıca yurtdışından düşük fiyatlı ürünlerin girmesi nedeniyle proteinin fiyat rekabetiyle karşı karşıya kalması sonucunda rekabet giderek yoğunlaşmaktadır. Türk ürünlerinin fiyat rekabeti veya özgünlük/avantajları göstermediği sürece hem gıda takviyeleri hem de protein pazarına girmesi zor görünmektedir.
2.Çikolata	3.537.158	-0,1	Çikolata, şekerleme pazarında önemli bir paya sahiptir. İthal çikolata (hammadde değil, bitmiş ürünler) Japon ürünlerinden daha yüksek fiyatlı olma eğilimindedir ve perakende kanalları uluslararası gıda mağazaları veya marketlerdeki belirlenmiş "ithalat" bölümleriyle sınırlıdır. Avrupa markalarının popülaritesi göz önüne alındığında, aynı seviyede fiyatlandırılırsa Türk çikolatalarının pazara girmesi oldukça zor olabilir.
3. Bisküvi, Kek, Pasta, Ekmek, Pirinçten Atıştırmalık	2.527.298	1,1	Pazar nispeten büyük olup hala genişlemektedir. Çikolataya benzer şekilde, Japon ürünleri ithal ürünlerden daha büyük bir pazar payına sahiptir. Perakende kanalları uluslararası gıda mağazaları veya marketlerdeki belirlenmiş "ithalat" bölümleriyle sınırlıdır. Avrupa markalarının popülaritesi göz önüne alındığında, benzer şekilde fiyatlandırılırsa Türk çikolatalarının pazara girmesi oldukça zor olabilir.

4.Makarna (Noodle, Spagetti, Şehriye, Lazanya, Kuskus dahil)	931.499	1,7	İtalya veya diğer denizaşırı ülkelerde üretilen makarnalar Japon halkı tarafından kabul görmekte olup genel olarak mevcuttur. Hem yerli hem de yabancı markaların fiyatları artmaktadır. Bu nedenle Türk ürünlerinin fiyat avantajları olursa ikame talebi içinde yer alabilir.
5. Soslar ve Hardal	2.308.057	0,4	Japon halkının tercih ettiği temel soslar ve çeşniler yerel üreticiler tarafından üretilmektedir. Bu nedenle, Türk çeşnilerinin Japonya'da yaygın olarak kabul görmesi biraz zaman alabilir. Türk mutfağı bir trend haline gelirse, Türk sosları kendi trendini yaratma şansına sahip olabilir. Çünkü Japon halkının etnik, Çin ve Kore mutfaklarında ihtiyaç duyulan çeşnileri ve sosları yurtdışından satın aldığı durumlar vardır.
6.Kuru Bakliyat	323.727	1,5	Japonya kuru bakliyat pazarına girmek için konulan engeller, yerel üretimi koruyan tarife kotası sistemi nedeniyle yüksektir. Ancak, birden fazla ülkeden istikrarlı arz sağlamanın Japonya için bir zorluk haline gelmesi nedeniyle bir fırsat bulunmaktadır. Çin ve Kanada, Japonya'da büyük miktarlarda tüketilen Azuki fasulyesinin en büyük iki tedarikçisidir. Ancak, Çin'deki Azuki fasulyesinin fiyatı, Çin'deki artan iç talep nedeniyle yükselmektedir. Bu arada, Kanada'daki Azuki fasulyesi üretimi, tahıllara yönelik artan uluslararası talep nedeniyle Kanadalı çiftçilerin mısır ve buğday yetiştirmeye yönelmesiyle birlikte düşmektedir. Türkiye yüksek kaliteli Azuki fasulyesi üretebilirse, Japonya'ya ihracatını artırmak için önemli bir fırsat yakalayacaktır.
7.Bitkisel Sıvı Yağlar ve Margarin	3.702.914	3,0	Kanola yağı ve karışık yağ ("salata yağı") gibi geleneksel yemeklik yağlar ve zeytinyağı gibi besin açısından zengin yağlar da dahil olmak üzere bitkisel yağların fiyatı genel olarak artmaktadır. Rekabetçi fiyatlı olmaları veya ek besin faydaları sunabilmeleri durumunda Türk yağlarına olan talepte artış beklenebilir.
8.Şekerleme	2.328.370	1,1	Pazar boyutu nispeten büyük olup hala genişlemektedir. Ancak, Japon üreticilerin pazara hakim olması nedeniyle sert ve yumuşak şeker pazarlarına girmek zor olabilir. Birinci sınıf ithal şekerler için perakende kanalları uluslararası gıda mağazaları veya marketlerdeki belirlenmiş "ithalat" bölümleriyle sınırlıdır. Öte yandan, ithal sakızlı şekerler, onları yerli ürünlerden ayıran farklı formlar ve tatlar sunarak gelişmektedir. İthal ürünlerin Japon sakızlı şekerleriyle rekabet ederek pazar payını ele geçirmesi için önemli bir potansiyel bulunmaktadır.

9. Mısırı Gevreği ve Kahvaltılık Tahıllar	399.709	0,9	Mısır gevreği ve kahvaltılık tahıllara olan talep belirli bir dönemde önemli ölçüde artmış olsa da pirinç ve ekmeğin yanında kahvaltılık temel gıda olarak tanınmayı başaramamıştır. Calbee (Japonya), Kellogg's (ABD) ve Nisshin Cisco (Japonya) gibi baskın markaların bitmiş tüketici ürünleri pazar payının çoğunluğunu işgal etmesiyle, ithal tahıllar genellikle yalnızca uluslararası gıda mağazalarında veya marketlerin "ithal gıdalar" bölümlerinde satılmaktadır. Bu arada, sağlıklı beslenme eğiliminin artmasıyla, tüketicilerin yulaf gibi tahıllara olan ilgisi artmaktadır. Bir markanın güçlü bir küresel tanınırlığı olmadığı sürece, bitmiş tüketici ürünleri yerine gıda sanayi için hammadde tedariki yaparak pazara girişte daha başarılı olma olasılığı yüksektir.
10. Çorbalar, Et Suları, Konsantre Dashi	1.039.087	0,2	Pazar payının çoğu Japon üreticiler tarafından domine edilmektedir. İthal ürünler çoğunlukla ithal gıda mağazalarında satılmakta olup miktar olarak fazla değildir. Üreticiler ürünlerini Japon zevkine odaklanarak geliştirdikçe, giriş engellerinin azalacağı varsayılmaktadır.
11. Bulgur ve Bulgur Pilavı (pişirilmiş)	87	17,1	Japonya'da bulgur yeme kültürü pek yaygın olmadığından, bunu yaygınlaştırmak zaman alacaktır.
12. Evcil Hayvan Maması	3.228.443	4,8	Japonya'daki evcil hayvan maması pazarı hacim olarak küçülürken değerde artış yaşanmaktadır. Sağlık fonksiyonlu ve ödül maması (iletişim maması olarak da adlandırılır) gibi katma değerli ürünlerin satışı yüksektir. Ürünlerin satışını genişletmek için önde gelen bir Japon distribütörüyle ortaklık kurmak gerekmektedir. Evcil hayvan maması üreticilerine Türk malzemelerini tedarik etmek, ihracatı artırmanın bir başka yöntemidir.

Japonya Gıda Pazarına Girmek İsteyen Firmalar İçin Öneriler

Türk firmalarını Japon süpermarket yetkilileriyle başarılı bir şekilde buluşturma olasılığı incelendiğinde, süpermarket yetkililerinin daha önce etkileşimde bulunmadıkları tedarikçilerle doğrudan görüşme olasılığının düşük olduğu tespit edilmiştir.

Japonya'daki büyük süpermarketlerle doğrudan bağlantı kurulması zor olsa da potansiyel Japon alıcılarını bulma konusunda aşağıdaki başlıklar tavsiye edilmektedir:

- Türk firmaları Japonya'da her yıl Şubat ayında düzenlenen "SUPERMARKET TRADE SHOW (https://www.smts.jp/en/index.html)" fuarına katılabilirler.

- Her ne kadar her yıl Mart ayında düzenlenen “FOODEX JAPAN (https://www.jma.or.jp/foodex/en/)” Japonya'daki gıda ile ilgili en ünlü fuar olsa da iş görüşmelerinden daha çok “ticaret fuarı” niteliği taşımaktadır. Öte yandan, “SUPERMARET TRADE SHOW” fuarı daha fazla iş görüşmesi fırsatı sunmaktadır. Bu nedenle Türk firmalarının bu fuara katılmasında fayda görülmektedir.

- 2026 yılında düzenlenecek olan “SUPERMARKET TRADE SHOW” için Türk firmalarının 2025 yılının bahar aylarında başvurularını yapması önerilmektedir.

JAPONYA HAKKINDA GENEL BİLGİLER

BAŞLICA SOSYAL GÖSTERGELER

Resmi Adı	: Japonya
Nüfus	: 123,8 milyon (2024)
Dil	: Japonca
Din	: %70,4 Şintoizm, %69,8 Budizm, %1,5 Hıristiyan
Etnik Yapı	: %98,1 Japon, %0,5 Çinli, %0,4 Kore
Yüzölçümü	: 377,899 km2
Başkent	: Tokyo
Başlıca Şehirler	: Tokyo (37 milyon) Osaka (19 milyon) Nagoya (9,5 milyon)
Yönetim Şekli	: Anayasal Monarşi
Para Birimi	: Japon Yeni-JPY

Kaynak: IMF

NÜFUS VE İSTİHDAM

Japonya etnik olarak homojen bir yapıya sahiptir. Yerel orjin halk olarak Japon ırkı dışında sadece Hokkaido bölgesinde sayıları 25 bini bulan Ainu Halkı bulunmaktadır. En büyük etnik grup ise Çin ve Koreliler olup sayıları yaklaşık olarak sırasıyla 627 bin ve 500 bini bulmaktadır.

2024 yılında 123,8 milyon kişi ile dünyada 11. sırada yer alan Japonya nüfusunun 2029 yılında 121 milyon kişi olacağı tahmin edilmektedir. ([Hindistan 1. (1,4 milyar), Türkiye 18. (86 milyon)] (IMF2024)).

Demografik yapı şu şekildedir:

0-14 yaş arası : 15,1 milyon kişi
15-64 yaş arası: 74,72 milyon kişi
65 yaş ve üzeri: 36,08 milyon kişi (%28,7)

Japonya 65 yaş üzeri nüfus oranında dünya birincisidir. Ortalama beklenen yaşam süresi 86 yıl olup, kadınlarda 87,32 erkeklerde 81,25 yıldır.

Japon ekonomisi tam istihdam düzeyindedir, yani işsizlik tarihi dip seviyelerinde olup %2,6 civarındadır. Japonya'da çalışan sayısı 66,28 milyon kişidir. Kendi veya aile işletmesi dışında ücretli çalışanların sayısı 59,23 milyondur. Çalışanların 2,11 milyonu tarımda 10,6 milyonu imalat sektöründe 4,59 milyonu inşaat sektöründe istihdam edilmektedir. Devlet memuru sayısı ise 2,39 milyondur.

GENEL EKONOMİK DURUM

	2022	2023	2024*	2025*	2026*	2027*	2028*	2029*
GSYİH (Cari Fiyatlar-milyar $)	4.271,93	4.219,83	4.070,09	4.389,33	4.584,64	4.742,53	4.949,61	5.075,03
GSYİH Büyüme (Sabit Fiyatlar-%)	1,2	1,7	0,3	1,1	0,8	0,6	0,6	0,5
Kişi Başına Düşen Milli Gelir (Cari Fiyatlar - $)	34.158	33.899	32.859	35.611	37.388	38.884	40.809	42.086
Tüketici Fiyat Enflasyonu (ort, %)	2,5	3,3	2,2	2	2	2	2	2
Cari İşlemler Dengesinin GSYİH'ya Oranı (%)	2,1	3,6	3,8	3,6	3,5	3,4	3,3	3,1
İşsizliğin Toplam İşgücüne Oranı (%)	2,6	2,6	2,5	2,5	2,5	2,5	2,5	2,5
Nüfus (milyon)	125,06	124,48	123,87	123,26	122,62	121,97	121,29	120,59
Devletin Genel Toplam Borçlanmasının GSYİH'ya Oranı (%)	256,3	249,7	251,2	248,7	246,9	245,7	244,8	245

Kaynak :IMF(*) Tahmini Veriler

2024 yılında cari fiyatlara göre, 4 trilyon dolar olacağı tahmin edilen GSYİH'nın 2025 yılında 4,3 trilyon dolar olması beklenmektedir (IMF-2024).

Japonya, cari fiyatlara göre, 2024 yılı itibariyle 196 ülke arasında dünyanın 4. Büyük ekonomisidir [ABD 1. (29 trilyon dolar), Türkiye 17. (1 trilyon dolar)] (IMF-2024).

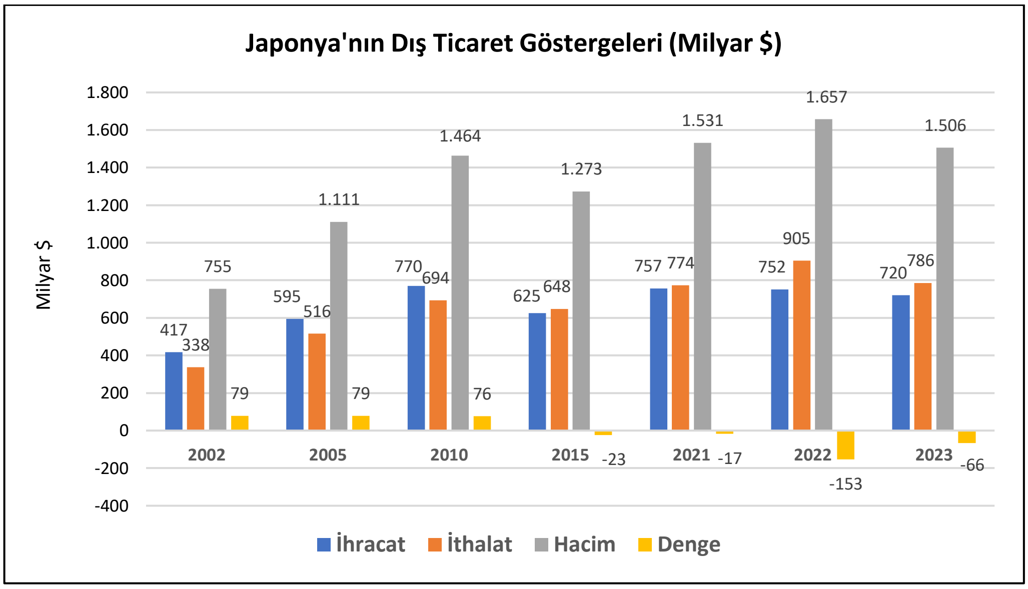
2024 yılında sabit fiyatlara göre %0,3 oranında artması beklenen GSYİH'nin, 2025 yılında %1,1 oranında artacağı tahmin edilmektedir (IMF-2024).

Cari fiyatlara göre Japonya, 2024 yılında 32 859 dolarlık kişi başına düşen milli gelir ile dünyada 39. sırada yer almaktadır [Lüksemburg 1. (135 321 $), Türkiye 67. (15 666 $)] (IMF-2024).

2024 yılında %3,8 oranında fazla vereceği tahmin edilen cari işlemler dengesinin GSYİH'ya oranının, 2025 yılında da %3,6 oranında fazla vermesi beklenmektedir (IMF-2024).

DIŞ TİCARET

Genel Durum

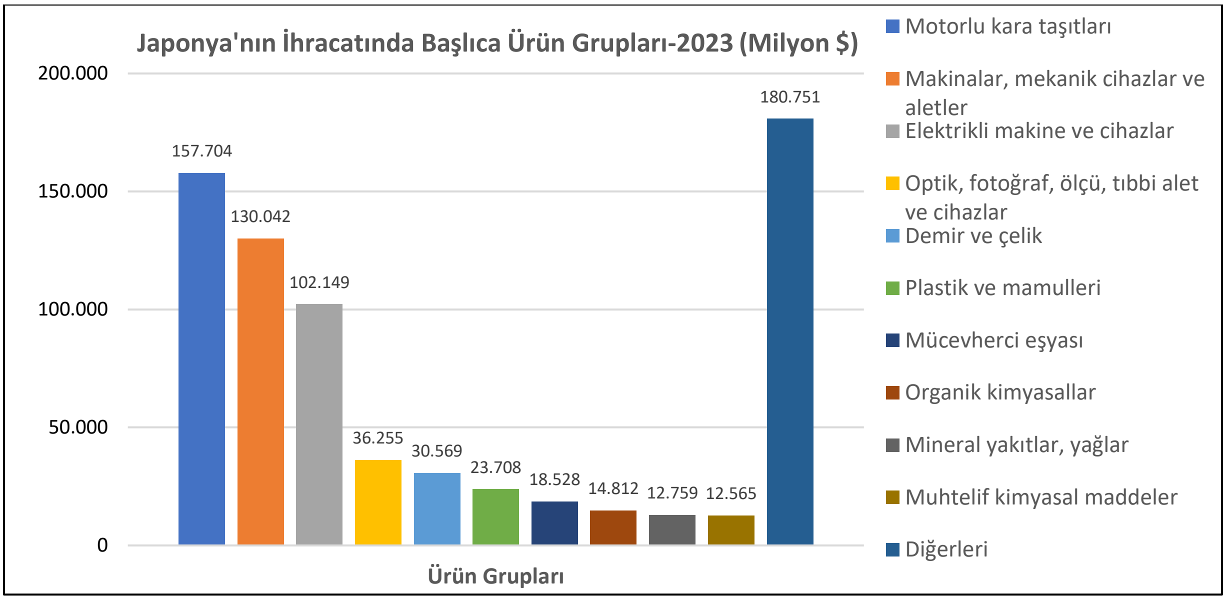


Kaynak: Trademap

Japonya toplam dış ticaret hacmi 2022 yılında 1.657 milyar dolar olup; 2023 yılında ise 1.506 milyar dolar olmuştur. Japonya genel olarak hammadde ve ara mal ithal edip mamul ürün ihraç eden bir ekonomidir. Japonya'nın en büyük ticaret alanı Asya bölgesidir.

Başlıca Ürünler İtibarı ile Dış Ticaret

İhracat



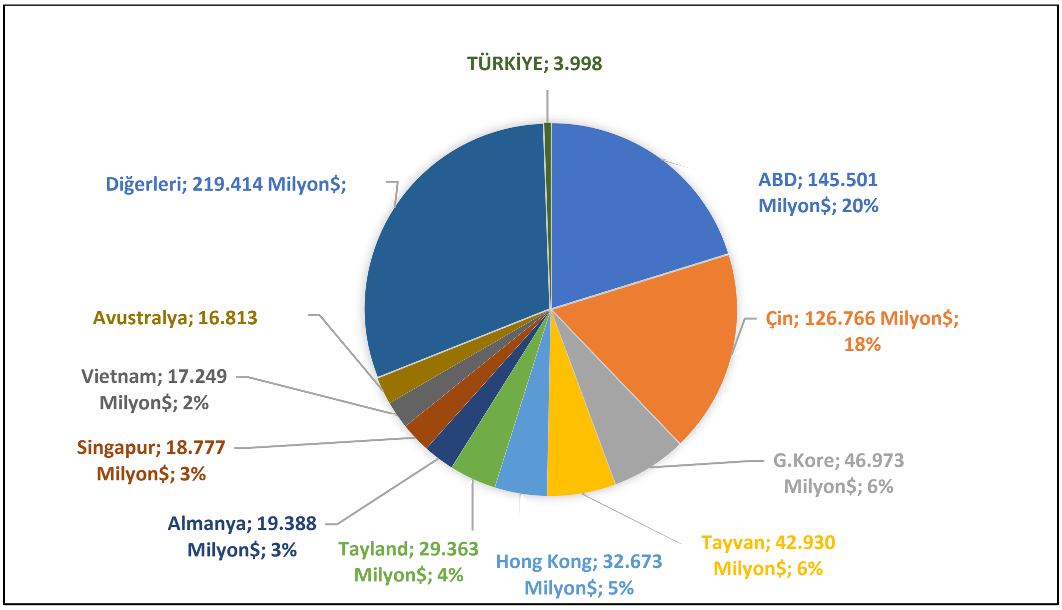
Kaynak: Trademap

Japonya'nın İhracatında Başlıca Ürünler (1.000 $)

	GTİP	ÜRÜNLER	2021	2022	2023	Pay %-2023	Değ.% (2022-23)
Sıra		**TOPLAM İHRACAT**	**757.461.387**	**752.071.999**	**719.844.077**	**100**	**-4,3**
1	8703	Otomobiller	85.589.554	87.198.901	110.937.486	15,4	27,2
2	8542	Elektronik entegre devreler	34.028.788	33.870.228	30.945.579	4,3	-8,6
3	8708	Karayolu taşıtları için aksam ve parçalar	32.550.291	29.093.875	27.228.681	3,8	-6,4
4	8486	Yarı iletken disklerin, külçelerin,entegre devrelerin vb. imalatında kullanılan makine ve cihazlar; aksam, parça-aksesuar	30.565.232	31.153.574	25.226.341	3,5	-19,0
5	8429	Buldozerler, greyderler, toprak tesviye makineleri, skreyperler, mekanik küreyiciler, ekskavatörler, yol silindirleri vb.	11.461.595	12.473.279	13.545.573	1,9	8,6
6	7108	Altın (platin kaplamalı altın dahil) (işlenmemiş veya yarı işlenmiş ya da pudra halinde)	7.636.738	10.878.030	12.496.257	1,7	14,9
7	2710	Petrol yağları ve bitümenli mineralllerden elde edilen yağlar	7.230.326	14.766.032	10.308.618	1,4	-30,2
8	7208	Demir veya alaşımsız çelikten yassı hadde ürünleri (genişliği 600 mm veya daha fazla)	10.760.803	11.113.101	10.118.485	1,4	-8,9
9	8901	Yolcu gemeiler, gezinti gemileri, feribotlar, yük gemileri, mavralar ve insan veya yük taşımaya mahsus benzeri gemiler	9.554.701	8.824.830	9.616.436	1,3	9,0
10	8704	Eşya taşımaya mahsus motorlu taşıtlar	10.025.598	9.986.139	9.420.136	1,3	-5,7
11	8541	Diyodlar, transistörler vd. yarı iletken tertibat; ışık yayan diyodlar; monte edilmiş piezo elektrikli kriataller	10.258.990	9.275.947	7.974.808	1,1	-14,0
12	8443	Baskı yapmaya mahsus makinalar; kopyalama ve faks makinaları; bunların aksam, parça ve aksesuarları	9.160.586	8.336.907	7.711.537	1,1	-7,5
13	8479	Kendine özgü fonksiyonu olan diğer makinalar ve mekanik cihazlar	9.768.428	8.695.973	7.633.481	1,1	-12,2
14	8536	Gerilimi 1.000 votu geçmeyen elektrik devresi teçhizatı (anahtarlar, röleler, sigortalar, fişler, kutular vb)	8.306.630	7.322.801	6.192.946	0,9	-15,4
15	8532	Sabit, değişken veya ayarlanabilir (ön ayar yapılabilir) elektrik kondansatörleri	7.949.865	7.196.938	6.187.970	0,9	-14,0
		Diğerleri	472.613.262	461.885.444	424.299.743	58,9	-8,1

Kaynak: Trademap

Japonya'nın Ülkelere Göre İhracatı-2023 (Milyon $- % Pay)



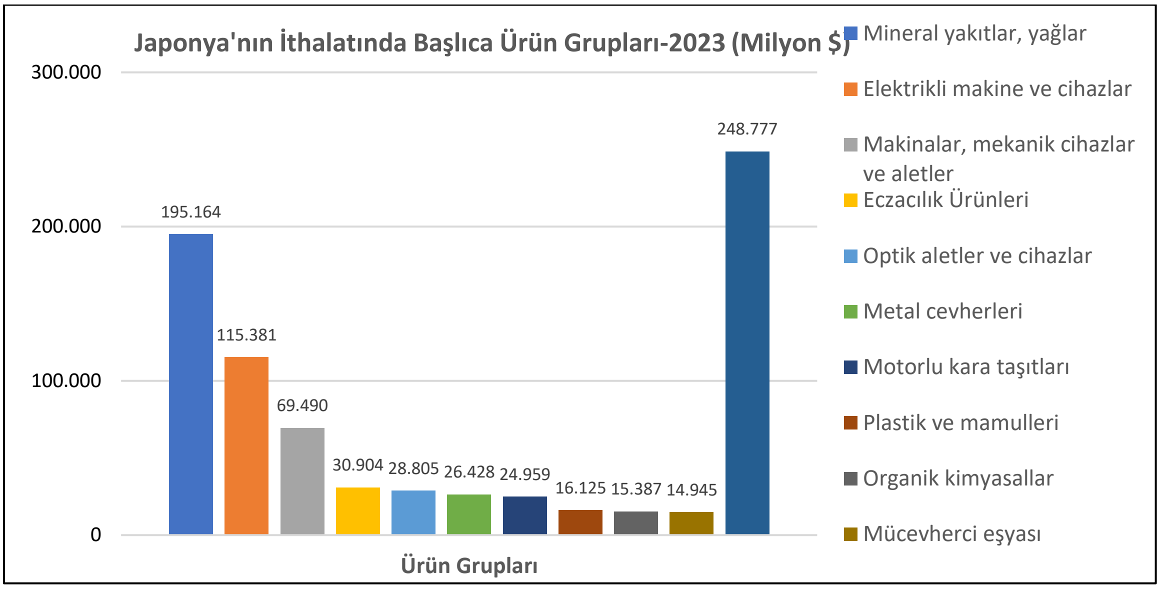
Kaynak: Trademap

Japonya'nın Ülkelere Göre İhracatı (1.000 $)

	ÜLKE	2021	2022	2023	Pay %-2023	Değ.% (2022-23)
Sıra	**TOPLAM İHRACAT**	**757.461.387**	**752.071.999**	**719.844.077**	**100**	**-4,3**
1	ABD	136.046.461	140.775.993	145.500.824	20,2	3,4
2	Çin	163.945.539	145.584.397	126.765.775	17,6	-12,9
3	G. Kore	52.595.406	54.432.482	46.973.194	6,5	-13,7
4	Tayvan	54.587.373	52.527.961	42.930.492	6,0	-18,3
5	Hong Kong	35.464.968	33.376.395	32.673.313	4,5	-2,1
6	Tayland	33.041.857	32.687.182	29.363.105	4,1	-10,2
7	Almanya	20.775.846	19.693.624	19.387.662	2,7	-1,6
8	Singapur	20.061.019	22.503.833	18.776.678	2,6	-16,6
9	Vietnam	19.114.504	18.776.889	17.248.795	2,4	-8,1
10	Avustralya	15.265.489	16.643.288	16.812.755	2,3	1,0
11	Hindistan	12.863.279	14.028.425	15.950.543	2,2	13,7
12	Endonezya	13.358.615	15.160.323	14.451.067	2,0	-4,7
13	Malezya	15.622.006	16.576.924	13.971.831	1,9	-15,7
14	Hollanda	12.596.067	12.463.935	13.466.548	1,9	8,0
15	Meksika	10.843.937	11.039.556	13.128.338	1,8	18,9
27.	**Türkiye**	**3.181.696**	**3.235.917**	**3.997.844**	**0,6**	**23,5**
	Diğerleri	138.097.325	142.564.875	148.445.313	20,6	4,1

Kaynak: Trademap

İthalat



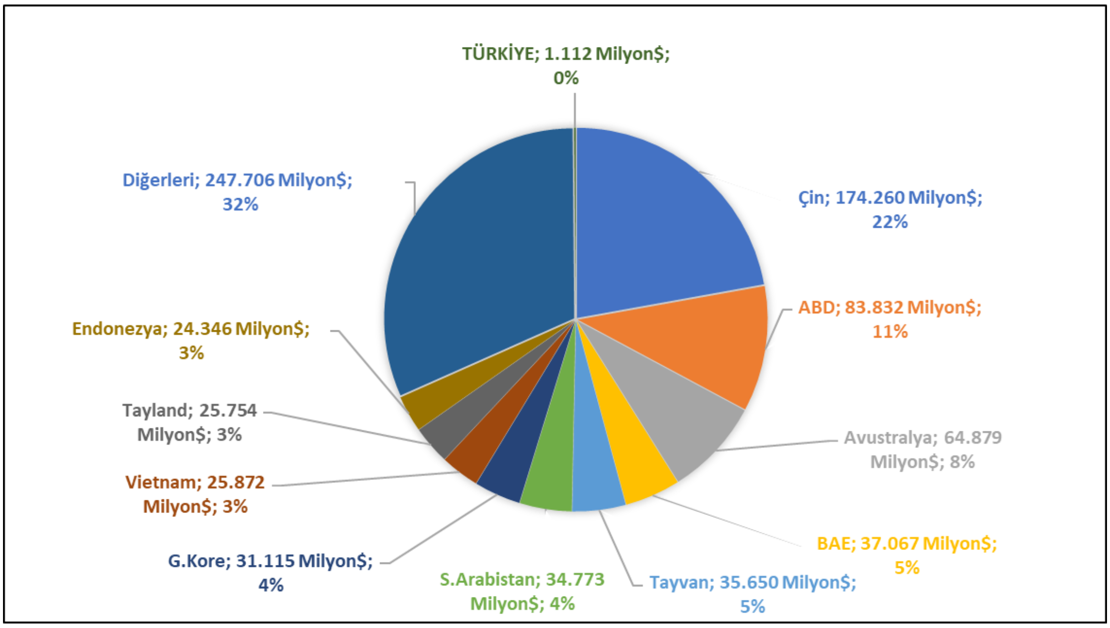
Kaynak: Trademap

Japonya'nın İthalatında Başlıca Ürünler (1.000 $)

	GTİP	ÜRÜNLER	2021	2022	2023	Pay %-2023	Değ.% (2022-23)
Sıra		TOPLAM İHRACAT	773.720.906	905.098.532	786.365.263	100,0	-13,1
1	2709	Ham petrol (petrol yağları ve bitümenli minerallerden elde edilen yağlar)	63.139.357	101.652.157	81.091.465	10,3	-20,2
2	2711	Petrol gazları ve diğer gazlı hidrokarbonlar	45.678.018	72.685.508	52.823.594	6,7	-27,3
3	2701	Taşkömüdür; taşkömürünbden elde edilen briketler, topak vb. katı yakıtlar	25.551.747	59.701.833	41.839.279	5,3	-29,9
4	8542	Elektronik entegre devreler	25.408.978	31.895.863	28.677.155	3,6	-10,1
5	8517	Telefon cihazları, ses, görüntü veya diğer bilgileri almaya veya vermeye mahsus diğer cihazlar	28.603.143	27.131.047	26.357.864	3,4	-2,8
6	2710	Petrol yağları ve bitümenli minerallerden elde edilen yağlar	18.454.990	20.166.225	17.787.605	2,3	-11,8
7	3004	Tedavide veya korunmada kullanılmak üzere hazırlanan ilaçlar (dozlandırılmış)	18.259.694	17.754.093	15.486.814	2,0	-12,8
8	8471	Otomatik bilgi işlem mak. Bunlara ait birimler; manyetik veya optik okuyucular, verileri koda dönüştüren ve işleyen mak.	18.853.799	17.772.764	15.195.898	1,9	-14,5
9	3002	İnsan kanı, hayvan kanı, serum, aşı, toksin vb. ürünler	17.871.379	20.108.691	13.987.148	1,8	-30,4
10	8703	Otomobiller	11.610.518	10.663.000	12.556.366	1,6	17,8
11	2603	Bakır cevherleri ve konsantreleri	13.148.083	13.817.342	11.770.720	1,5	-14,8
12	2601	Demir cevherleri ve konsantreleri	17.855.025	13.825.889	11.595.638	1,5	-16,1
13	8544	İzole edilmiş teller, kablolar ve diğer elektrik iletkenleri; tek tek kaplanmış liflerden oluşan fiber optik kablolar.	8.415.978	8.507.063	8.913.736	1,1	4,8
14	8708	Karayolu taşıtları için aksam ve parçalar	7.470.757	7.613.722	8.409.611	1,1	10,5
15	8411	Turbojetler, turbopropellerler ve diğer gaz türbinleri	4.864.637	6.002.866	7.564.455	1,0	26,0

Kaynak: Trademap

Japonya'nın Ülkelere Göre İthalatı-2023 (Milyon $ - % Pay)



Kaynak: Trademap

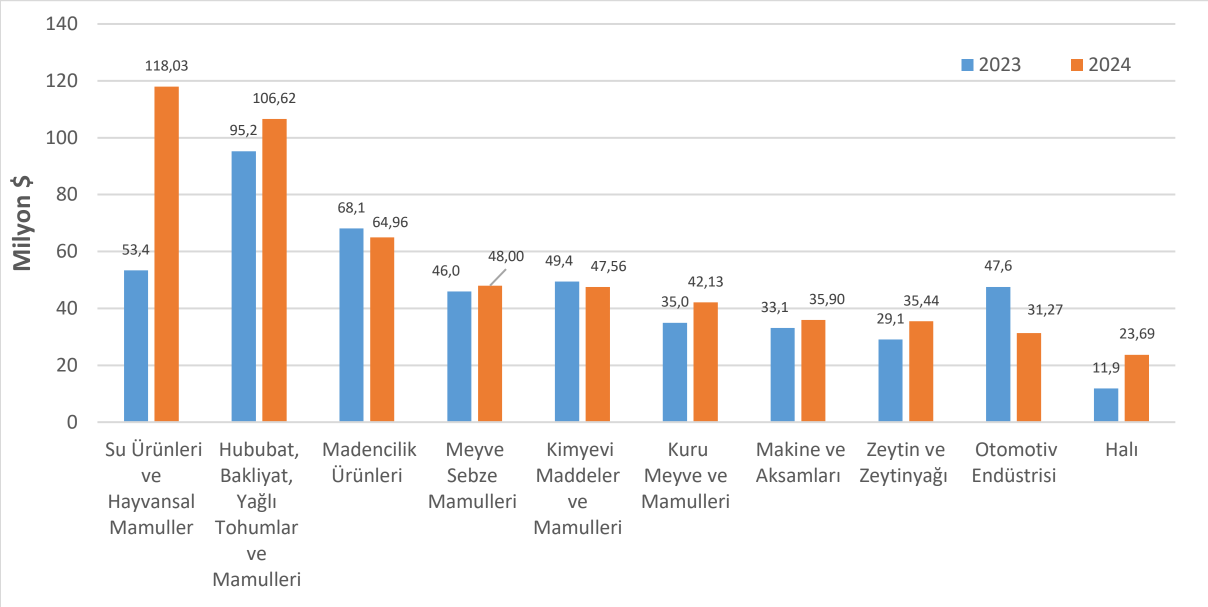
Japonya'nın Ülkelere Göre İthalatı (1.000 $)

	ÜLKE	2021	2022	2023	Pay %-2023	Değ.% (2022-23)
Sıra	**TOPLAM İHRACAT**	**773.720.906**	**905.098.532**	**786.365.263**	**100**	**-13,1**
1	Çin	185.800.620	190.223.513	174.260.232	22,2	-8,4
2	ABD	83.130.275	91.341.148	83.832.265	10,7	-8,2
3	Avustralya	52.447.436	89.039.881	64.878.617	8,3	-27,1
4	BAE	27.147.184	46.136.111	37.067.123	4,7	-19,7
5	Tayvan	33.530.408	38.917.274	35.650.203	4,5	-8,4
6	S. Arabistan	27.524.404	42.657.588	34.772.571	4,4	-18,5
7	G. Kore	32.099.820	33.818.223	31.114.771	4,0	-8,0
8	Vietnam	23.022.781	26.617.965	25.871.833	3,3	-2,8
9	Tayland	26.373.709	26.809.393	25.753.663	3,3	-3,9
10	Endonezya	19.662.679	28.925.067	24.345.758	3,1	-15,8
11	Almanya	23.728.531	22.869.965	22.463.915	2,9	-1,8
12	Malezya	19.748.876	26.281.678	20.142.033	2,6	-23,4
13	Kanada	13.733.312	16.710.400	14.504.989	1,8	-13,2
14	İtalya	11.676.472	11.816.596	12.035.299	1,5	1,9
15	Brezilya	9.868.371	11.171.636	11.063.621	1,4	-1,0
51	**Türkiye**	**808.124**	**1.026.340**	**1.111.801**	**0,1**	**8,3**
	Diğerleri	183.417.904	200.735.754	167.496.569	21,3	-16,6

Kaynak: Trademap

TÜRKİYE İLE TİCARET

Türkiye'nin Japonya'ya İhracatında Başlıca Sektörler



Kaynak: İhracatçı Birlikleri Verileri

Türkiye'nin Japonya'dan İthalatında Başlıca Ürünler

Kaynak: TÜİK

Japonya'ya Yönelik Hububat, Bakliyat, Yağlı Tohumlar ve Mamulleri Sektör İhracatımız

	2022		2023		2024	
ÜRÜN	**Miktar (kg)**	**Değer ($)**	**Miktar (kg)**	**Değer ($)**	**Miktar (kg)**	**Değer ($)**
MAKARNA	60.296.051	56.889.744	61.940.809	62.079.013	73.672.268	71.930.820
KAKAO VE KAKAO MÜSTAHZARLARI	2.849.925	12.077.181	2.494.395	10.160.737	3.114.294	12.249.171
DİĞER YAĞLI TOHUMLAR	1.307.580	4.713.711	1.041.875	5.182.918	808.830	5.935.155
KAKAOSUZ ŞEKER MAMÜLLERİ	1.779.870	5.720.057	1.463.630	5.474.611	1.155.749	4.272.825
RAFİNE AYÇİÇEK YAĞI	1.771.198	3.255.809	3.287.670	4.519.429	2.832.849	3.603.674
DİĞER ŞEKER VE ŞEKER MAMÜLLERİ	1.601.723	1.529.263	1.316.900	1.878.209	2.948.150	3.195.989
TATLI BİSKÜVİ VE GOFRETLER	914.117	3.308.195	713.663	2.841.067	777.032	2.908.297
DİĞER BİTKİSEL YAĞLAR	817.488	1.437.274	823.513	1.289.396	674.232	964.412
DİĞER PASTACILIK ÜRÜNLERİ	158.628	941.454	188.638	991.277	153.947	867.243
MERCİMEKLER	93.420	112.806	148.115	162.593	214.705	199.779
BULGUR	62.496	116.609	57.254	77.252	85.310	109.141
YENİLEN ÇEŞİTLİ GIDA MÜSTAHZARLARI	26.281	195.098	31.793	180.597	26.761	102.826
KAHVE VE BAHARAT	8.458	39.041	4.545	31.556	10.976	74.170
NOHUT	28.320	44.952	41.594	49.182	29.355	51.116
GIDA SANAYININ KALINTI VE DOKUNTULERI, HAYVAN YEMİ	11.054	15.802	13.061	23.783	39.549	43.147
DİĞER DEĞİRMENCİLİK ÜRÜNLERİ	0	0	11.980	15.834	22.610	40.735
FASULYE	0	0	0	0	11.005	11.331
MISIR	12.641	42.787	45.770	141.371	4.577	4.190
NİŞASTA. İNÜLİN	48	120	72	180	96	240
BUĞDAY UNU	0	0	0	0	0	0
İRMİK (BUĞDAYDAN)	1.300	1.300	4.020	4.476	0	0
MISIR YAĞI	0	0	0	0	0	0
AYÇİÇEĞİ TOHUMU	0	0	0	0	0	0
SOYA YAĞI	0	0	0	0	0	0
MARGARİN	1.856	7.458	0	0	0	0
TOPLAM	**71.742.455**	**90.448.661**	**73.629.298**	**95.103.483**	**86.582.294**	**106.564.262**

Kaynak: İhracatçı Birlikleri Verileri