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Report Name: Food Service - Hotel Restaurant Institutional

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Report Highlights:

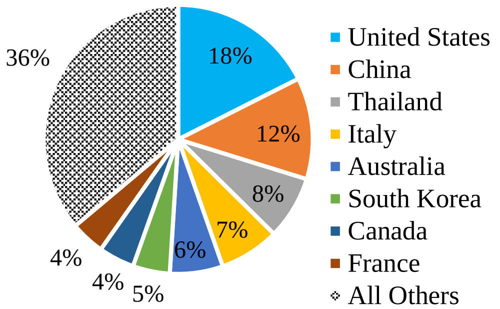
Japan confronted its second year of the COVID-19 pandemic with continued disruptions to the Hotel, Restaurant, and Institutional food service industry. In 2021, total sales from the hotel, restaurant, and institutional food service industry totaled $231 billion (JP¥24,621 billion), a decrease of nearly four percent from 2020. Despite the overall declines, American style fast food chains and fine-dining restaurants experienced stable sales. Japan's food service industry will continue to depend on imported foods, and the U.S. is well positioned to continue supplying this segment with U.S. agricultural products accounting for more than one quarter of the food that Japan imports.

Market Fact Sheet: Japan

Executive Summary:

The United States is the largest foreign supplier of food and agricultural products to an import-reliant Japan (22 percent of import market share)—the fourth largest market for U.S. agricultural products in 2021 ($15.6 billion). On January 1, 2020, the U.S.-Japan Trade Agreement (USJTA) entered into force, providing preferential tariff access for many U.S. agricultural products. Japan's food industries are well-developed and innovative in all sectors, including, retail, food service, food processing, and distribution.

Japan Consumer-Oriented Product Imports ($41 Billion, 2021)



Food Processing Industry:

The $216 billion food processing industry produces a wide variety of foods: traditional Japanese, Western, and health-oriented foods for infants and the elderly. Food processors focus on maintaining market share among traditional product lines while developing creative and innovative food products to attract consumers.

Food Retail Industry:

In 2021, the total value of all retail food and beverage sales was $467 billion. Supermarkets represent the bulk of the retail food sales at 74 percent and the convenience store sector accounts for approximately 15 percent of sales. Ready-to-eat meals or take-home foods represent an area of growth.

Population:	125,300,000 (Dec. 2021 est.)
GDP:	$5.08 trillion (3rd)
GDP/Capita:	$40,335

Top Ten Growth Food Products

1) Beef and Beef products
2) Pork and Pork Products
3) Meat Products
4) Tree Nuts
5) Dairy Products (Cheeses)
6) Condiments and Sauces
7) Fresh Vegetables
8) Eggs & Products
9) Beer
10) Processed Fruit

Food Industry by Channels (US$)

Consumer-Oriented Imports	$41 billion
Food Processing Industry	$216 billion
Food Industry Gross Sales	$698 billion
- *Retail (2021)*	*$467 billion*
- *Food Service (2021)*	*$231 billion*

Top Ten Retailers

AEON	Life Co
Seven & I Holdings	H2O Retailing
Yamazaki Baking	Valor Holdings
Pan Pacific International Holdings	USM Holdings
Isetan Mitsukoshi	Izumi

Strength	Weakness
U.S. products are in demand and remain trendy.	The negotiating and decision-making process can take time.
Opportunity	**Challenge**
With USJTA, nearly 90 percent of U.S. products are duty free or receive preferential tariff access.	For products not covered in USJTA, many other suppliers enjoy tariff concessions through other FTAs.

Data sources include: Trade Data Monitor, Japan Ministry of Finance, Japan Ministry of Economy, Trade and Industry, Japan Food Service Association, The World Factbook, The World Bank

COVID-19 impact on Food Service Sales:
During the second year of the COVID-19 pandemic in Japan, nationwide SOEs and semi SOEs impacted sales from drinking establishments and pub-style dining establishments. From October through December 2021, sales from the entire food service segment had been slowly recovering from the complete shutdowns the year prior. The Agricultural Trade Office (ATO) continues to follow the market situation in the retail and the food service industry. For recent reports on the COVID-19 impacts, information can be referenced here.

Data and Statistics Note:
The Japan HRI report is regularly produced with key data and statistics from the Japan Foodservice Association (JF), which releases its data and statistics every August. Due to the COVID-19 pandemic, JF has delayed releasing its complete industry data and statistics for 2021. As a result, the 2021 Japan HRI report utilized market research from, Fuji Keizai Marketing Research & Consulting Group, a private company, to capture the entire HRI industry market size. This report also utilized JF's available data from July 2021 through July 2022 which reflects monthly trends of member restaurants totaling approximately 73,000 outlets and 800 food service operators.

Note: In this report, the currency statistics used are converted using the 2021 average exchange rate, since year-to-year fluctuation in exchange rates can distort trends.
Figure 1: Exchange Rate – Annual Average

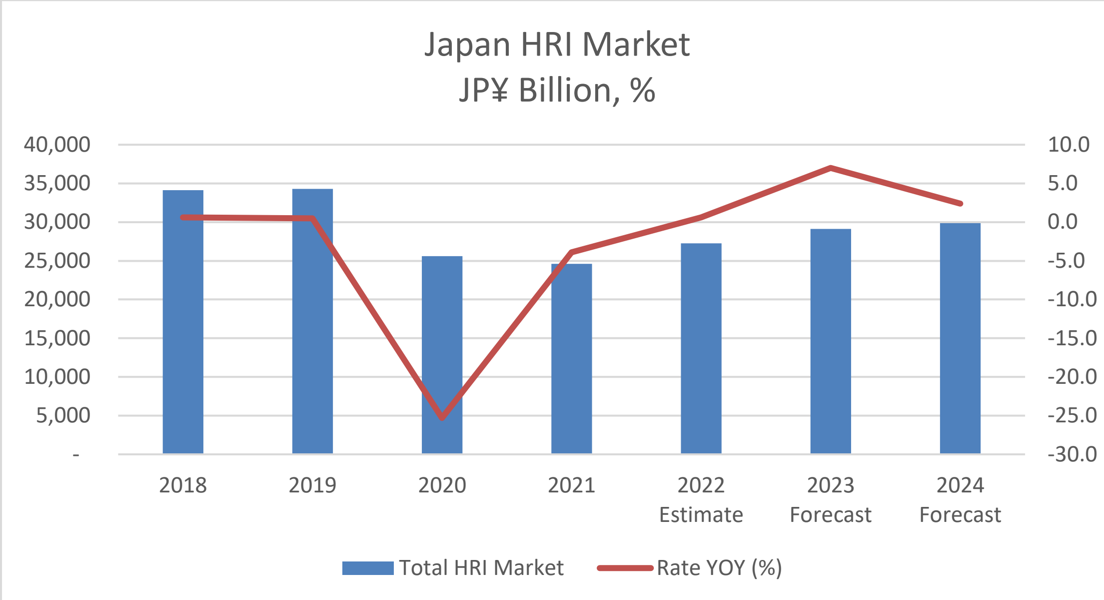
Year Average	2019	2020	2021
JP¥ per US$	109.008	106.725	109.817

Resource: Internal Revenue Service – Yearly Average Currency Exchange Rates
https://www.irs.gov/individuals/international-taxpayers/yearly-average-currency-exchange-rates

SECTION 1. MARKET SUMMARY

In 2021, the total value of all food service industry sales in Japan decreased by nearly four percent to $231 billion (JP¥24,621.1 billion) from $239 billion (JP¥25,614.3 billion) in the previous year, according to available data from Fuji Keizai Marketing Research. This data and research also highlight estimated total sales of the food service market as noted below.

Figure 2: Japan HRI Market – Total Sales Pre, During and Post COVID-19 Estimates



Resource: Fuji Keizai Marketing Research & Consulting Group
YOY = Year-on-year rate

The Japanese HRI industry is broadly made up of ten major segments:

Figure 3: Japan Food Service Industry Market – Sales by Segments

Segment\Year	2020		2021			2022 (Estimate)	
Amount\Currency	¥ billion	$ billion	¥ billion	$ billion	% Share	¥ billion	$ billion
Fast food	3,026.6	27.6	3,244.8	29.5	12.7	3,390.5	30.9
Take out	7,072.8	64.4	7,139.7	65.0	28.0	7,188.6	65.5
Home delivery	824.5	7.5	820.6	7.5	3.2	878.9	8.0
Transportation	21.9	0.2	15.3	0.1	0.1	36.2	0.3
Leisure facilities	615.1	5.6	649.0	5.9	2.5	705.3	6.4

Institution	3,831.9	34.9	3,936.2	35.8	15.4	3,950.2	36.0
Pub dining	2,534.2	23.1	1,444.3	13.2	5.7	2,445.0	22.3
Restaurant	4,564.0	59.5	3,945.9	42.7	17.9	4,801.3	45.9
Café/tea shop	1,084.1	9.9	1,175.5	10.7	4.6	1,275.3	11.6
Hotel	2,039.4	18.6	2,250.0	20.5	8.8	2,570.8	23.4
Total: HRI	25,614.3	251.1	24,621.2	231.0	100.0	27,242.0	250.2
Trend: year-on-year	-23.7%		-3.9%			10.6%	

Resource: Fuji Keizai Marketing Research – Food Service Industry Handbook 2022, No. 1 and No. 2
Exchange Rate: JP¥109.817 per $USD

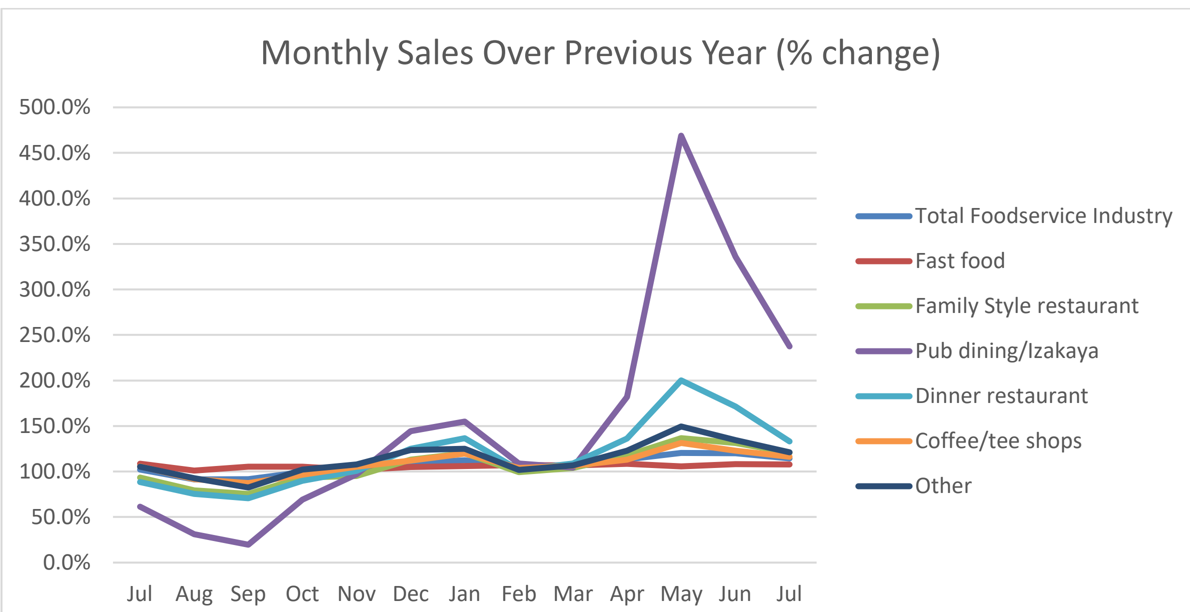
Among these segments is western style (hamburger, fried chicken and bakery) fast-foods, Noodles (ramen, soba/udon and pasta), and Japanese style (beef bowl, sushi and other bowls) foods. In 2021, sales in the fast-food sector increased by 7.2 percent from the previous year, driven by increased take away and food delivery services in residential areas. Sales of hotel restaurants/banquet and café-coffee and tea shops also increased by 10.3 percent and 8.4 percent respectively from the previous year. These positive increases reflect a steady recovery to normal trends started from October through December 2021 when semi-SOE was lifted up. On the other hand, according to Fuji Keizai research, the Pub dining/drinking establishments segment, which serves alcoholic beverages was inflicted with stop serving alcoholic beverages or closing restaurants during the SOE or semi-SOE restrictions. As a result, sales of drinking establishments in 2021 dropped by 43 percent from 2020.

According to Fuji Keizai research, Western-style fast food has trended positively. Fast food chains fortunately had developed business – to – consumer applications just before the COVID-19 Pandemic. Along with the SOE has declared, apps have improved and have pervaded take-away aspect of consumers convenience which supported increasing sales of the fast-food segment. In 2021, take-away sales of steakhouse increased by 13.9 percent from 2020 according to implementation of online service. Sales of hamburgers increased by 10.5 percent, Chicken up 7.8 percent, donuts surged 18.3 percent respectively from 2020.

Pizza delivery chains also performed well with sales increasing approximately 11 percent in 2021. On the other hand, sales of home/office delivery other than pizza, such a Chinese food, sushi, bento, and catering decreased by 11.7 percent, 1.2 percent, 5 percent, and 0.9 percent respectively. These declines were driven as a result of costly delivery fees, intensified competition with other food service segments and restaurants reopening dining operations.

Meat-oriented restaurants continued to show strong business performance. Although the number of steakhouse and "hamburg" (juicy meatloaf) restaurants declined by 3.5 percent in 2021 due to the SOE/Semi-SOE by the pandemic, sales of the steak/hamburg restaurants increased by 3.4 percent in 2021 from the year before. The Yakiniku segment also showed strong sales in the residential areas. A Nagoya based Yakiniku company, Sakai Group, with 110 restaurants has more outlets in suburban area than in city center. Sakai utilizes more than 100 metric tons of U.S. beef monthly and had stronger sales at the outlets in residential areas than in business districts in 2021 through 2022. The company has bought Wagyu and domestic beef to make up for the shortfall. Now, the restaurant buyer commented recent price gap between domestic beef and U.S. beef reversed due to price hike of U.S. beef, weak yen exchange rate against the U.S. Dollar and high freight cost. This is also being experienced by every Japanese buyer of U.S. beef.

According to Fuji Keizai research, the number of restaurants have been decreasing since 2019.   In 2019, 981,295 restaurants were in operation, compared to 921,780 in 2021, a decline of 6 percent in three years. The Japanese food service industry had been hit hard by the COVID-19 crisis but is steadily recovering with efficient management and converting some of its operations to take-out/delivery.
Figure 4: Japan Foodservice Industry Monthly Sales Over Previous Year



Resource: Japan Foodservice Association (JF) Monthly Trend
Sales increase/decrease from the same month of the previous year, semi-SOE lifted up from March 17, 2022

Japan HRI industry stakeholders are pursuing new and creative ways to reach consumers in response to the COVID-19 pandemic with changing consumer lifestyles and preferences. Imported foods will continue to play an important role in supporting these industry adjustments.

Advantages	Challenges
Implementation of the U.S. – Japan Trade Agreement provided substantial market access to about 90 percent of U.S. agricultural products by duty free or receive preferential tariff access.	Several competing countries including Canada, Australia, Chile, Mexico, and the EU have already implemented trade agreements providing preferential tariff access.
Stable supply ability of U.S. agricultural products have established a foundation of credibility among Japanese importers.	Price hike of U.S. agricultural products and shipping cost reversed price competitiveness between domestic products and U.S. products.
High Japanese farming costs and decline of domestic agricultural production make imported food products vital.	Japanese buyers are now sourcing from all over the world rather than their more limited historic suppliers.
The successes of American style restaurants provide an avenue for introducing U.S. recipes and food ingredients into the Japanese diet.	Many consumers view American cuisine has a less healthy image which linked to higher rates of obesity in the United States than in Japan.
U.S. food manufacturers have a positive reputation for food safety relative to many Asian competitors, especially among the trade.	Imported food products are viewed by many consumers as less safe than domestically produced food products.
American style breakfast, brunch concepts and steak houses are catching on. These concepts help expand U.S. food product usage in the industry	Latin American and Asian exporters have been improving distribution infrastructures and quality assurance (QA) procedures.

Constrains and Opportunities
Soaring Prices
Commodity and food prices have been soaring in Japan since Russia's invasion of Ukraine. The rapid depreciation of the yen exchange rate against U.S. dollar is also driving up costs for foodstuffs. According to a Sendai-based food wholesaler, the price for cooking oil more than doubled from JP¥2,600 per 16.5 kilograms liter can in 2020 to JP¥5,600 in 2022. The price of wheat rose by 22 percent in 2022 until the Government of Japan intervened on the domestic wheat price. Relatedly, the average price of bread increased by over 20 percent at retail.

In a recent survey, Nikkei newspaper found nearly three quarters of restaurant operators in Japan plan to raise prices in the current fiscal year, passing on the rising cost of ingredients to customers. The survey was conducted from early April to early June 2022 and received responses from 302 companies out of 554 major food service companies sent questionnaires. Seventy percent of responding companies raised their prices from the previous year's survey, and 73 percent of respondents said they would do so again in 2022.

On the other hand, major restaurant chains started to produce food and seafood by themselves in order to ensure a stable supply of food ingredients. A famous ramen chain, Ippudo, cultivates green onions on a large-scale faming in Kyushu. A tacoyaki (octopus ball) restaurant/take away chain, Gindako, has started experimental aquaculture of octopus production on land. Many restaurant chains also started to grow rice and/or vegetables in various farmlands in Japan. All are aiming for a more stable supply.

Japan will Restart of Visa-Free Tourist Travel
On October 11, 2022 Japan will drop a ban on individual tourist visits and remove a cap on daily arrivals, moving closer to pre-pandemic rules as the country looks to ride a global travel rebound. The government is looking to take advantage of fall travel demand at a time when a weak yen boosts international travelers' buying power in Japan. Qualifying travelers are expected to have to meet certain conditions, such as vaccination status.

SECTION II. ROAD MAP FOR MARKET ENTRY

Market Entry and Structure
Generally, the first step to market entry is to find an importer, which may take a considerable amount of time. There are no magic formulas for new–to-market exporters to enter the Japanese food service market. Strategies will vary depending on the type of food product being introduced and the current competitive environment. However, there are some basic steps that new-to-market exporters are recommended to follow when they consider entering the market.

One of the fundamental steps before entering the market is to determine whether a product is authorized for sale in Japan. There could be restrictions due to phytosanitary or food safety related concerns that can prevent product from being imported. A preliminary analysis should be completed to determine market potential of products, pricing of similar products, key points of differentiation for the product compared to others, and what kind of packaging is used to sell competitor products. Products must meet Japanese regulations for food ingredients, especially regarding food additives. If the product contains prohibited ingredients it will have to be reformulated to meet the regulations. Exporters should also determine the import classification and tariff rate for products. Freight forwarders and traders can be helpful in determining the category a product belongs to.

For more information, see the latest FAS Japan Food and Agricultural Import Regulations and Standards (FAIRS) report and Exporter Guide at: Exporter Guidance.

Japan Customs has a website for requesting an advance ruling on tariff classifications, which is available to importers and related parties at: https://www.customs.go.jp/english/advance/classification.htm

When possible, visiting Japan is recommended. The Tokyo and Osaka Agricultural Trade Offices (ATO), U.S. Agricultural Cooperator Groups, and State and Regional Trade Groups (SRTG) are available as resources for obtaining information about the market. Private companies may also be hired to do product testing among actual consumers and to gauge their reactions to product taste, appearance, and texture. Participating in one of the food related trade shows or showcases allow exporters to research a product's potential and meet Japanese importers who often do not respond to "cold calls" or requests for meetings from unknown companies. The ATO Japan offices organize U.S. pavilions at the Supermarket Trade Show in February and FOODEX Japan in March and offers support to U.S. exhibitors such as market briefings and arranging meeting space. Other smaller trade shows can also be useful, depending on the target audience.

Distribution

Japan has one of world's most developed food supply chains. One major difference with the United States is that individual restaurants tend to buy food at nearby butcher shops, fresh food markets, local supermarkets, and/or small size food wholesalers. Chain restaurants tend to procure food from food service industry wholesalers who offer combined shipment/delivery of all kinds of foods and restaurant business materials. Some of these wholesalers import food directly from foreign countries but most of them buy imported foods through trading houses, which carry out a variety of functions, including handling documentation, clearing customs, testing for quality assurance, warehousing, and financing the inventory.

Some "cash and carry" retailers, including wholesale clubs such as COSTCO are popular sources for food products among smaller-sized food service operators. The biggest is Gyomu Super (Business Supermarket) owned by a local company, Kobe Bussan. Additionally, regional food wholesalers have formed strategic purchasing alliances and have opened cash and carry outlets. Bulk packed meat, seafood, fresh produce, coffee, seasonings/condiments, wine, cheese, frozen vegetables, and frozen baked items are popular selling food products at these outlets. HRI-focused wholesalers are consolidating. To add value, most large wholesalers own their own distribution trucks and focus on carrying broad product lines that can provide small food service operators or small chains with one-stop service.

Online shopping has been popular for general consumers, use among the food service industry is also increasing to high-quality fresh seafood and fresh vegetables/fruits delivered directly from production areas to restaurants. The COVID-19 pandemic has accelerated online food distribution, traditional wholesalers at fresh markets started online business for restaurants while keeping the quality of food. These Japanese wholesalers include all cost in food prices and do not charge for delivery separately.

Major Food Service Companies

Top Ten Restaurants (Source: Nikkei MJ Newspaper)

1. McDonald Japan (QSR)
2. Zensho Holdings (beef bowl & etc.)
3. Colowide (pub dining & etc.)
4. Skylark Holdings (restaurants)
5. Sushiro (sushi casual, Food and Life Company)
6. Plenus (bento & restaurants)
7. KFC Japan (QSR)
8. Kura Zushi (sushi casual)
9. MOS Burger (QSR)
10. Toridoll (Marukame-Seimen, noodle QSR)

Top Five Institutional Food Service (Source: Nikkei MJ Newspaper)

1. Nisshin Healthcare Hood Service
2. Aim Service
3. Green House
4. LEOC
5. Fuji Sangyo

Top Ten Hotel Chains with Food Service (Source: Fuji Keizai Foodservice Industry Handbook 2021)
1. Seibu Prince Hotel Worldwide
2. Marriott International
3. Hoshino Resort
4. Kyoritsu Maintenance (Dormy Inn, La Vista)
5. Okura Nikko Hotel Management

SECTION III. COMPETITION

The United States is Japan's top agricultural trading partner and known as a reliable export partner that provides safe and high-quality food and beverage products. Under the U.S.-Japan Trade Agreement, nearly 90 percent of U.S. agricultural products enter duty free, or receive preferential treatment. The tariffs on U.S. beef and beef products have decreased from approximately 27 percent in 2019 to 24.1 percent in 2022, for example. Other product tariffs have also gradually decreased. For more information, please refer to the USDAjapan.org website. However, competitors also have free trade agreements with Japan that reduce or eliminate food and agricultural tariffs, including: the European Union, Canada, Australia, Chile, and Mexico.

The United States is the leading pork exporter to Japan with a 35 percent overall market share and is the leading supplier of fresh/chilled pork, with a 33 percent market share. The United States has a strong association with beef and shares Japan's import market primarily with Australia. U.S. wheat accounts for roughly half of the annual imports, with Canada and Australia making up the other half. Soybean imports are primarily from the United States on a value basis at approximately 70 percent, with Brazil and Canada being the main competitor for food-grade soybeans. The EU, New Zealand, and Australia supply most cheeses, while the U.S. market share is around ten percent. The main U.S. competition for fruits and vegetables come from regional producers, with China primarily supplying on proximity, price competitiveness, and varietal preferences.

Products Present in the Market which have Good Sales Potential
With the implementation of USJTA, USDA Japan published one-page fact sheets to highlight key product categories that received preferential tariff treatment in the agreement (linked in the table below). More information on tariff treatments may be found at USDAJapan.org.

Beef & Beef Products	Demand for U.S. lean beef and products continues to increase, mainly through the food service and restaurant channels. This longstanding growth can be attributed in part to Japan's aging population and single-person households, coupled with health-conscious attitudes. New and existing restaurant chains that feature U.S. beef are expanding. For more information, see JA2022-0023.
Pork & Pork Products	Japan imports around 50 percent of its pork supply. Pork is one of the most popular protein choices for Japanese households and is likely to overtake fish as the most consumed protein within the next few years. Ground seasoned pork (GSP) is a key ingredient for domestic sausage manufacturers. For more information, see JA2022-0023.
Poultry and Egg products	The United States was the sixth biggest supplier of poultry products in 2021. Thailand, Brazil, and China were major suppliers for Japan market. Demand of

	fried chicken and skewered chicken are increasing due to recovery of drinking service restriction at restaurants. Chicken products creates more demand in Japan after the COVID-19 calmed down. JA2021-0122.
Processed Vegetables	After China, the United States is the second largest supplier of processed vegetables, with roughly 20 percent of the import market share in volume. The United States is a major supplier of prepared potatoes, tomato paste, and prepared sweet corn. Higher consumption of home-meal replacements is expected to bolster producer demand for processed vegetables. For related information, see here.
Wheat and Wheat Products	U.S. food wheat is a key ingredient in Japanese bakery and noodle production. USJTA provides tariff parity with competing food wheat suppliers such as Australia and Canada. It also gives the United States a tariff advantage over Turkey, one of the leading pasta suppliers. Pasta is the primary wheat product imported by Japan. For more information, see JA2020-0058.
Fresh & Processed Fruit	Japan imports one-third of its fresh fruit and 90 percent of its processed fruit, with the United States ranked as the second largest supplier for each. Opportunities for U.S. fresh fruit exports to Japan are expected to increase due to falling domestic production. The United States supplies large quantities of raisins and prunes as well as frozen blueberries and strawberries. For related information, see here.
Tree Nuts and Peanuts	U.S. tree nuts are increasing in popularity in the convenience health snack sector, as detailed in JA2022-0036. Almonds, walnuts, pecans, and peanuts, in plain, roasted and salted forms, are common in single-serve snack packaging at convenience stores across Japan. The Japanese food service industry is beginning to explore new salad creations that incorporate tree nuts.
Whiskey	In 2022, increased domestic consumption and surging global demand for Japanese whiskies led to a record $429.8 million in imports, which are often blended and bottled by local producers. U.S. whiskey exports to Japan reached a record $121.9 million and accounted for 88 percent of total spirits shipments in 2019. For more information, see JA2020-0053.
Wine & Beer	Wine consumption in Japan has risen steadily over the last decade. Total imports were valued at $1.8 billion in 2019. For more information, see here. In 2019, the United States became the largest supplier of beer by value at $15.6 million, due to premium craft beer sales. For related information, see here.
Cheeses	Nearly 90 percent of cheese consumed in Japan is imported. Cheese consumption has grown continuously since 2013. Consumption has traditionally focused on domestically produced processed cheese products which use imported natural cheese as ingredients. Popular processed products include sliced cheese, cheese sticks, and bite-sized cheese wedges. For more information, see JA2020-0174.

Top Consumer-Oriented Products Imported from the World

- Pork and Pork Products
- Chicken and Chicken Products
- Beef and Beef Products
- Coffee
- Wine

Top Consumer-Oriented Products Imported from the United States

- Beef and Beef Products
- Pork and Pork Products
- Processed Vegetables
- Tree Nuts
- Dairy Products

Products Not Present in Significant Quantities which have Good Sales Potential

Japan imports a broad array of products representing the full spectrum of America's consumer-ready, intermediate, and bulk food production. However, Japanese importers and consumers frequently seek new, trendy, and innovative products. Opportunities may be found at any time for competitively priced, quality, or novel products, e.g. alternative meat (plant based protein) products, edible oil, prepared chicken, coffee, dairy products, craft beer and spirits.

Products Not Present Because They Face Significant Barriers

- Fresh Potatoes

SECTTION V. KEY CONTACTS AND FURTHER INFORMATION

Reports from USDA Japan, including the Agricultural Trade Offices and the Office of Agricultural Affairs, are frequently updated and can be found by searching the FAS Japan Reports website

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USDA Japan Online

http://www.usdajapan.org/ (FAS Japan, English)
https://twitter.com/usdajapan (FAS Japan, English)
https://ustr.gov/usjta (USJTA, English)

Japan External Trade Organization (JETRO)

Japanese market and regulations: https://www.jetro.go.jp/en/reports/
Specifications and Standards for Foods, Food Additives, etc. under the Food Sanitation Law:
JETRO | Japan External Trade Organization: Search with "food import regulation"

Ministry of Health, Labor and Welfare
Imported Food Safety: Imported Food Safety ｜Ministry of Health, Labour and Welfare (mhlw.go.jp)
Japan Food Sanitation Law: Food Sanitation Act (japaneselawtranslation.go.jp)
U.S. laboratories approved by the Japanese Government, visit
Ministry of Health: List of Foreign Official Laboratories (mhlw.go.jp)

Ministry of Agriculture, Food and Forestry
Statistics and articles: Links : MAFF

Japan Customs
Tariff rates in Japan are calculated on a CIF basis and Japan adds an 8% consumption tax to all imports.
Japan tariff rates are found here: http://www.customs.go.jp/english/tariff/

Attachments:
No Attachments