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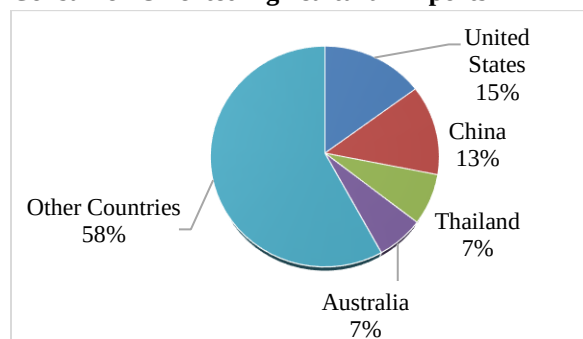
Report Highlights:

Japan's retail sector remained stable despite continued dollar strength against the yen, with sales totaling \$286 billion in 2025 and rising demand across supermarkets, convenience stores, and drug stores. Retailers have targeted younger consumers seeking easy-to-prepare, frozen, and ready-to-eat foods to drive growth. Starting with the 2026 report, FAS Tokyo updated its retail sector data source, revealing a larger market and greater opportunities than previously estimated. In August 2026, Japan's Cabinet approved a plan to cut the grocery consumption tax from 8 to 1 percent for two years, beginning April 2027, while keeping the dining-out tax at 10 percent. If enacted, this is expected to modestly boost domestic food demand and shift consumption from dining out toward eating at home. Building and maintaining relationships with Japanese manufacturers and importers remains critical to successful market entry.

Executive Summary:

The United States is the largest foreign supplier of food and agricultural products to an import-reliant Japan (15 percent of import market share)—the third largest single market for U.S. agricultural and related products in 2025 (\$14.7 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.

Consumer-Oriented Agricultural Imports



Top Exporting Countries to Japan, 2025

Source: [Trade Data Monitor, LLC](#)

Food Retail Industry: In 2025, the total value of all retail food and beverage sales was \$285.5 billion. Supermarkets represent the bulk of the retail food sales at 46 percent and the convenience store sector accounts for approximately 21 percent of sales. Ready-to-eat meals and take-home convenience foods represent an area of growth.

Food Processing Industry: In 2025, the \$174 billion food processing industry produced 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 Service Industry: In 2024, total sales of Japan's hotel, restaurant, and institutional food service industry increased by 16 percent, reaching \$228 billion. The continued surge in international

tourists contributed to increases in all categories within the hotel and restaurant industry.

Quick Facts CY 2025

Imports of Consumer-Oriented Products

(US \$billion) \$41.7

List of Top 10 Growth Products in Host Country

- | | |
|-------------------------|-----------------------------|
| 1) Meat | 2) Condiments and Sauces |
| 3) Processed Vegetables | 4) Other Consumer- Oriented |
| 5) Confectionery | 6) Dairy (Cheeses) |
| 7) Tree Nuts | 8) Fresh Fruits |
| 9) Processed Fruits | 10) Egg & Egg Related |

Food Industry by Channels (U.S. billion)

Retail Food Industry	\$285
Food Service-HRI (2024)	\$228
Food Processing	\$174
Food and Agriculture Exports	\$10

Top 10 Host Country Retailers (based on sales)

AEON	Valor Holdings
Seven & I Holdings	Life Corporation
Family Mart	USM Holdings
Lawson	Trial Holdings
Pan Pacific International Holdings	Yaoko Company

GDP/Population

Population (million): 123.4

GDP (billions USD): \$4,440

GDP per capita (USD): \$35,951

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

Strengths	Weaknesses
- U.S. products are in demand and remain trendy.	- The negotiating and decision-making process can take time.
Opportunities	Challenges
- 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. - Fluctuations in the Japanese Yen- U.S. dollar exchange rate.

Section 1: Market Summary

The food and beverage retail industry totaled \$285.5 billion in 2025 and encompasses supermarkets, convenience retailers, hypermarkets, small local grocers, foods e-commerce, food/drink specialists, and warehouse clubs (See Table 1). The weakening Japanese yen significantly impacted the growth of the actual Japanese retail food and beverage market. In 2025, the yearly average exchange rate (Japanese yen to USD) was 149.6 (Source: [IRS.gov](https://www.irs.gov)) and in July 2026, the yen reached its lowest level against the dollar in 40 years, to nearly 164 yen to \$1.

Data note: Beginning with this report, food retail sales data will be sourced from Euromonitor International Ltd. rather than the Japanese Ministry of Economy, Trade and Industry. This transition reflects Euromonitor's broader and more diverse range of data inputs, which FAS Tokyo believes provides a more comprehensive snapshot of overall market size. As a result, the sector appears considerably larger than previously estimated, the 2025 report placed the market at \$193 billion, suggesting even greater opportunities for U.S. agricultural exports than previously understood.

Table 1: Food Retail Sales by Category for 2023-2025

Category		2023		2024		2025
	Billion \$	Share %	Billion \$	Share %	Billion \$	Share %
Supermarkets	129.2	44.6	123.1	45.0	131.0	45.9
Convenience Retailers	60.4	20.9	56.7	20.8	58.5	20.5
Hypermarkets	45.1	15.6	41.6	15.2	42.1	14.7
Small Local Grocers	22.1	7.6	20.2	7.4	20.4	7.1
Foods E-Commerce	14.6	5.1	14.3	5.2	15.6	5.5
Food/Drink Specialists	13.5	4.7	12.4	4.5	12.5	4.4
Warehouse Clubs	4.6	1.6	4.9	1.8	5.4	1.9
Total Market	289.6	100.0	273.2	100.0	285.5	100.0

Source: [Euromonitor International Ltd. 2026](https://www.euromonitor.com). Please see Attachment 1 for official category definitions.

Advantages and Challenges

U.S. food and beverage products continue to be prominently displayed at supermarkets and are frequently sought out by consumers for quality and freshness. Bakery goods, cereals, confectionary products, and tree nuts represent some of the best prospects of U.S. consumer-oriented products. These prospects are also true for non-traditional retailers, such as drug stores, which increasingly sell vegetables, fruits, and ready-made meals. The rising demand for nutritious and convenient food, as well as the growing popularity of food purchases at drug stores and other stores, further support export opportunities for nonperishable products such as nuts and dried fruit. Japan's retail sector is highly fragmented, presenting a significant challenge for exporters seeking to maximize the number of stores

carrying their products. As discussed in Section 2, cultivating relationships with individual companies is essential to success in the Japanese market—a process that requires sustained, long-term investment.

In August 2026, Japan's Cabinet approved a plan to cut the consumption tax on grocery food from 8 to 1 percent for two years, beginning April 2027, while keeping the dining-out tax at 10 percent. If passed, this is expected to modestly boost domestic food demand and drive a shift from eating out toward eating at home. See [GAIN JA2026-0055](#) for additional information.

ADVANTAGES	CHALLENGES
Reduced duties under the U.S.-Japan Trade Agreement	Some U.S. products face higher tariffs than competitor suppliers due to trade agreements
U.S. products have a high-quality reputation	Japanese consumers generally prefer domestic products over imports and are willing to pay a premium for “made in Japan”
Perception of the United States as a reliable supplier with large production capacity	Desire for Japanese importers to diversify risk by sourcing from multiple countries
High standards for food safety and animal/plant health	Strict regulatory standards for imports that sometimes exceed U.S. domestic regulations
Diverse range of product availability from bulk to intermediate to consumer-oriented	High costs for marketing in Japan and the need to adjust retail packaging for domestic market
Increasing westernization of consumer food preferences	Deliberate pace of business decision-making and the expectation of long-term involvement and commitment by foreign suppliers
Variety of product availability with flavors and different functions	Inflation and the strengthening of the U.S. dollar vis-à-vis the Japanese yen have made U.S. products less price competitive

Retail Market by Channel

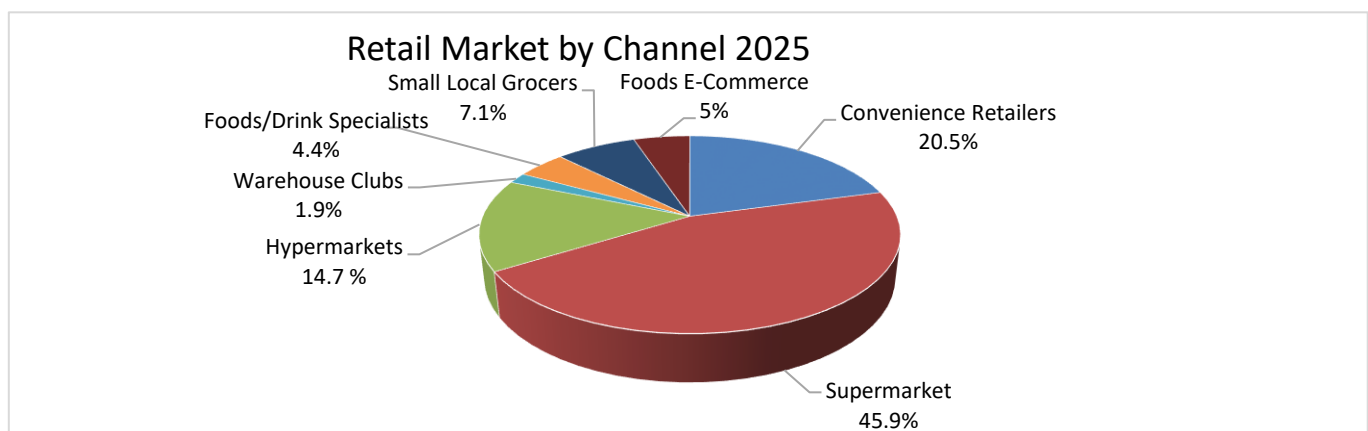


Figure 1 Retail Market by Channel 2025 Source: [Euromonitor International Ltd 2026](#)

Supermarkets: The supermarket sector is the largest food retail channel in Japan, accounting for 45.9 percent of total sales in 2025. Supermarkets offer a wide range of fresh foods, packaged products, frozen foods, beverages, and household necessities. Major supermarket operators include AEON, Life Corporation, Seiyu, and Maruestu. The large number of supermarket locations across Japan leads to highly accessible and convenient for everyday food shopping.

Convenience Store (“combi”): The convenience retail sector accounted for 20.5 percent of total food retail sales in 2025. Convenience stores offer ready-to-eat meals, lunch boxes, snacks, frozen foods, and beverages, mainly targeting consumers seeking quick and accessible food options. Seven-Eleven remained the largest convenience store chain in Japan, with 21,534 stores in 2025, an increase of approximately 1.35 percent from 2024. FamilyMart remained second with approximately 16,000 stores and Lawson ranked third with 13,806 stores. Their wide store networks and high accessibility make convenience stores highly popular throughout Japan.



Figure 2 Readymade Snacks, lunch boxes, and frozen foods sold in "combi" Source: FAS/Tokyo

Hypermarkets: The hypermarket sector accounted for 14.7 percent of total food retail sales in 2025. Hypermarkets combine food retail with a broad selection of clothing, household products, electronics, and other general merchandise. Major hypermarket operators in Japan are AEON and Ito-Yokado.

Small Local Grocers: Small local grocers accounted for 7.1 percent of total food retail sales in 2025. These retailers - independent neighborhood grocery stores, kiosks, corner shops, and small family-run food stores - mainly serve nearby residential communities, offering a limited range of groceries, beverages, and household essentials.

Foods E-Commerce: Food e-commerce accounted for 5.5 percent of total food retail sales in 2025, spanning online supermarkets, e-commerce platforms, food manufacturers' online stores, and other retailers—led by players like Amazon, Rakuten, AEON, and Oisix Inc. Growth reflects rising demand among remote workers and convenience-focused consumers, fueled by online shopping habits that took hold during the pandemic. New entrants, from general merchandise stores to e-commerce specialists and food manufacturers, continue to expand the sector.

Foods/Drinks Specialists: This sector accounted for 4.4 percent of total food retail sales in 2025. These retailers generally focus on one category of food or beverage. Examples include bakeries, meat shops, fish shops, green grocers, liquor, and tobacco shops. Although the sector represents a small share of the market, it maintains steady demand from consumers who seek specialized, high-quality goods.

Warehouse Clubs: Warehouse clubs accounted for 1.9 percent of total food retail sales in 2025. Consumers pay membership fees and sell food, beverages, and household goods in bulk package sizes. Costco Wholesale Corporation is the leading example of a warehouse club operating in Japan. Despite the traditional Japanese preference for small package sizes, Japan has become Costco's second-largest market after North America, signaling a significant and growing opportunity for U.S. products.

Other Sales Channels Not Captured in Table 1: Outside the traditional retail sector, other channels continue to grow their food and beverage sales alongside their core product lines. Drug stores are a notable example: although not included in Table 1, the sector accounted for 11.7 percent of total food retail sales in 2025, up from 11.2 percent in 2024, according to the Ministry of Economy, Trade and Industry's Current Survey of Commerce. This growth reflects an expanding selection of food products available in drug stores, which allow consumers to purchase medicines, cosmetics, daily necessities, food, and beverages in one location, a convenience particularly valued by elderly consumers. Home improvement centers and major electronics retailers have also expanded their food and beverage offerings, though sales data are unavailable on the proportion of food sales relative to their total sales.

Japanese Retail Trends: Price Increases and Strong Demand for Health Food

The Japanese retail market has experienced widespread price adjustments due to the depreciation of the Japanese yen and rising cost of raw materials, transportation, and manufacturing. According to Kyodo News, approximately 20,609 food items were subject to price increases in 2025, compared with 12,400 items in 2024. This marked the first time in two years that the number of food items affected by price increases exceeded 20,000. As a result, Japanese consumers continue to face inflation pressure. Recent fluctuations in the dollar-yen exchange rate have added further price pressure for consumers. Although the United States conducted a yen-buying intervention in July 2026 to stabilize the currency after it fell to a 40-year low against the dollar, it remains difficult to predict whether further fluctuations will occur, or whether any resulting benefits will ultimately reach end users in the retail sector.

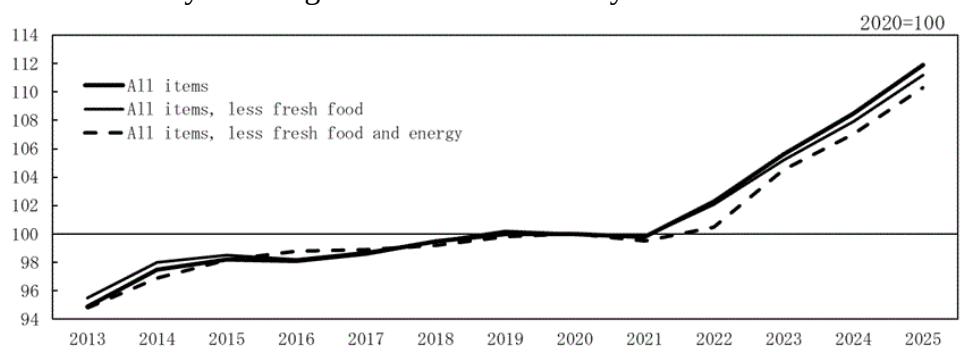


Figure 3: Japan's Consumer Price Index Source: [Statistics Bureau of Japan](#)

Recent trends in Japan's food retail sector reflect shifting demographics and preferences. As the older adult population grows, demand is rising for foods with health and beauty benefits, such as collagen- and iron-enriched ice cream and skin-supporting yogurt, marketed toward seniors. Younger consumers show strong interest in nuts, dried fruits, protein-based products, and foods supporting physical and emotional well-being, prompting companies to accelerate product development. Social media has also fueled interest in healthy, visually appealing foods, with fruit-and-vegetable recipes and dishes prepared using bamboo steamers called *seiro* gaining popularity for their healthy image and convenience.

Consumer Trends: Cost- and Health- Consciousness and Convenience-oriented Behavior

In recent years, Japanese consumers have demonstrated three major tendencies in their eating habits: cost-consciousness, health-consciousness, and convenience-oriented behavior. According to a consumer trend survey released by Japan Finance Corporation in February 2025, the number of consumers indicating cost-consciousness as a primary purchasing factor reached a record high of 45.6 percent, up 1.4 percent from 2024, reflecting a growing emphasis on cost amid rising prices and stagnant wages.

Health consciousness among Japanese consumers remained high at 44.0 percent, reflecting growing interest in nutrition, such as eating more vegetables and reducing sodium. Convenience-oriented behavior also rose to 40.3 percent (up 4.8 percent from 2024), as consumers turned to frozen foods, ready-to-eat dishes, and pre-cut produce to save time. This trend is accelerated by lifestyle pressures, including balancing work, childcare, and elder care amid Japan's aging population.

The Role of Tourism in Sustaining Japan's Domestic Economy

Another major factor influencing the Japanese economy is the continued growth in inbound tourism. In 2025, Japan welcomed around 42.6 million visitors, including 3.3 million from the United States (a 21.4 percent increase from 2024). The 2025 Osaka-Kansai Expo contributed to this growth. During the Expo, the Kansai region welcomed more than 8.7 million visitors, including approximately 1.5 million international tourists to the Expo. The weak yen has made Japan an increasingly attractive destination for tourists seeking its traditional culture, cuisine, and pop culture attractions. Tourist destinations across Japan, from major cities like Tokyo and Osaka to traditional areas like Kyoto and Nara, have gained popularity on social media, driving growing interest in regional areas that showcase local food, scenery, and culture. While rising prices have curbed leisure spending among Japanese consumers, foreign tourist spending, particularly on food, dining, and retail, continues to support the domestic economy.

Section 2: Road Map for Market Entry

Market entry may take a considerable amount of time, especially for ingredient suppliers. Manufacturers frequently search for specific ingredients but may be unwilling to disclose new product development plans and discuss product-sourcing needs. The challenge for U.S. ingredient suppliers, therefore, is to build a relationship with potential manufacturer partners so that when new product needs arise, that

relationship can be leveraged. To capitalize on those opportunities, it is important to secure product and in-country representation. Building a relationship with a local importer is a critical early step.

Market Structure

The flowchart on the right demonstrates how imported products tend to enter and move through the traditional Japanese distribution system. Ingredient products will most likely be handled by an importer (who serves as a first-line wholesaler), a second-line wholesaler, and/or a retailer. An importer plays the following roles: import processing, financing, customs clearance, warehousing, and the preparation of order and shipping documentation.

Regulations on ingredients and additives are very strict, and exporters must ensure that products are permitted. As part of the product clearance and approval process, it is also common that

local processors and the Japanese government request specific information regarding product handling and composition. In addition, local manufacturers have a reputation for demanding very high standards of product quality and consistency, while also having a reputation for working collaboratively with suppliers to develop long-term supply relationships. Despite the work involved, the Japanese market has enormous potential. Strategies for entering the market vary depending on product characteristics, competition, and the market environment. However, buyers in the food and beverage industry often prefer to find new products at large trade shows, or specially targeted trade shows, where they can look at many products at once. Participating in one of Japan's many trade shows is highly recommended to learn about the market and meet with potential business partners. The largest local food related trade shows are the Supermarket Trade Shows and FOODEX Japan, which take place annually in February, March, and July.

Entry Strategy

To get started, companies interested in exporting should: 1) Ensure production capacity to commit to the market, 2) Ensure sufficient financial and non-financial (staff, time, etc.) resources to actively support exported product(s), 3) Evaluate whether the ability exists to tailor product packaging and ingredients to meet foreign import regulations, food safety standards, and cultural preferences, 4) Ensure knowledge necessary to ship overseas, such as being able to identify and select international freight forwarders, manage climate controls, and navigate export payment mechanisms, such as letters of credit, and 5) Research USDA cooperators or local State Regional Trade Groups (SRTG) by visiting the [Getting Started](#) section of the Foreign Agricultural Service webpage. These groups work closely with USDA to help food and agricultural companies advance their export goals.

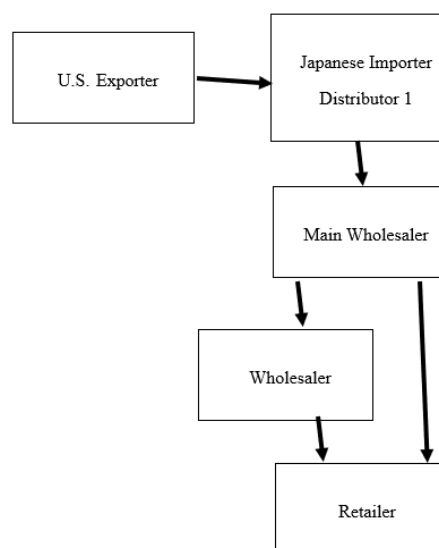


Figure 4: Flowchart of the Japanese Distribution System for Imported Products Source: FAS/Tokyo

Once a company has established a foundation for exporting, they should determine whether the product is permissible by Japanese food regulations. The [Exporter Guide](#) and the [Food and Agricultural Export Regulation Report](#) (FAIRS), published by the USDA Japan offices contain much of the necessary information. For plant or animal health inquiries, local [APHIS offices](#) provide information. If the product contains meat or meat products, companies should reference the [Food Safety Inspection Service Export Library](#). The Japan External Trade Organization (JETRO) [Handbook for Agricultural and Fishery Products Import Regulations](#) is also a helpful tool for reviewing Japanese food regulations to determine product compliance, local laws regarding additives, residue levels, and processing procedures, as well as regulations in terms of weight, size, and labeling. They should also perform basic market research by determining: the specific area of the market that company product is targeting; whether there is demand for the product; and the comparative advantages of product versus Japanese and other suppliers. Companies can determine demand by doing research online, speaking with other companies that have experience in the market, visiting Japan to conduct market tours, or attending a trade show. When determining comparative advantages, companies should keep in mind transportation and modification costs. Potential customers need to be convinced of the product's merits including price savings, higher quality, higher value, or more convenient packaging.

Having collected information on the general market, product, and regulatory information, companies should begin the process of creating an export action plan. This can be a helpful tool for relaying product vision to distributors and buyers. The plan should have some flexibility as portions may change after personal interaction with the market or as more information is gathered. Companies should also visit Japan to explore opportunities first-hand or find a representative. Face-to-face interaction is very important in Japan, where personal relationships are highly valued. Companies should vet their partners to ensure they have a good reputation and record of accomplishment. When it comes to finding a buyer, trade shows are excellent tools for market research as well as for finding potential distributors. FAS updates the [list of USDA-endorsed trade shows](#) annually. Companies should contact their appropriate [SRTG](#) or USDA Cooperator to inquire about upcoming activities such as trade missions or showcases. For more information on trade shows in Japan, please read [GAIN JA2020-0054](#).

Selected Major Domestic Companies

- [Kirin Holdings](#) (Beverage, alcohol)
- [Nippon Ham Foods Ltd.](#) (Meats)
- [Meiji Holdings Co., Ltd.](#) (Daily beverage, confectionery)
- [Ajinomoto Co., Inc.](#) (Food and amino acids)
- [Yamazaki Baking Co., Inc.](#) (Bread and bakery products)
- [Umios](#) (Seafood)
- [Itoham Foods Inc.](#) (Ham and Sausage)
- [Megmilk Snow Brand Co., Ltd.](#) (Dairy products)
- [Kewpie Corp.](#) (Mayonnaise and Dressing)
- [Asahi Group](#) (Beverage, alcohol)
- [Suntory Ltd.](#) (Beverage, alcohol)

Section 3: Competition

The United States is the leading pork supplier to Japan followed by Canada and Spain. Japanese consumers strongly associate beef and pork with the United States, although it faces strong competition. Globally, Japan is a top five importer of pork and beef by both value and volume.

U.S. Pork & Pork Products \$1,308 million

The United States is the #1 exporter with 26 percent market share by value.

Canada and Spain are top competitors.

U.S. Beef & Beef Products \$1,713 million

The United States is the #2 exporter with 40 percent market share by value.

Australia is the main competitor.

U.S. wheat accounts for around 38 percent of annual imports, with Canada and Australia as strong competitors. Most of the wheat used in the bakery sector is from the United States

U.S. Wheat, \$610 million

United States is #2 exporter with 38 percent market share by value.

Canada and Australia are competitors.

Soybean imports are primarily from the United States on a value basis at approximately 66 percent, with Brazil and Canada being the main competitors for food-grade soybeans.

U.S. Soybean, \$1,183 million

United States is #1 exporter with 66 percent market share by value.

Canada and Brazil are competitors.

Japan is an important user of U.S dairy products. Cheese is supplied mainly by New Zealand and Australia, each with a market share of around 20 percent, while the U.S. has a 15 percent market share.

U.S. Dairy, \$546 million

United States is #2 exporter with 20 percent market share by value.

New Zealand, Australia, and the European Union are competitors.

The United States strongly supports Japanese animal production by serving as the primary supplier of corn, holding a dominant 98% market share. Japan is the second largest market for U.S. corn.

U.S. Corn, \$3,895 million

United States is #1 exporter with 98 percent market share by value.

Brazil is the second largest exporter.

U.S. potatoes play a vital role in the potato chip and frozen French fry markets, supplying products used across restaurants and chain restaurants, in children's meals, and for at-home snacking.

U.S. Potato, \$511 million

United States is #1 exporter with 66 percent market share by value.

China, Belgium, and the Netherlands are competitors.

Tree nuts have experienced steady growth in Japan over the past five years, with the United States leading the market as the top exporter, holding a 51 percent market share.

U.S. Tree Nuts, \$428 million

United States is #1 exporter with 51 percent of the market share by value.

China, Vietnam, and India are competitors.

Data for the competition section is sourced from Trade Data Monitor, LLC for 2025 data using the FAS Global Agricultural Trade System Bulk, Industrial, and Consumer Oriented (BICO) categories or Harmonized System codes where a BICO category was unavailable.

Section 4: Best Product Prospects

For the implementation of U.S. Japan Trade Agreement (USJTA), USDA Japan published one-page fact sheets to highlight key product categories that received preferential tariff treatment. More information on tariff treatments may be found at [USDAJapan.org](https://usda-japan.org).

Products Present in the Market which have Good Sales

Wheat & Wheat Products: U.S. food wheat is a key ingredient in Japanese bread and baked goods production. The USJTA provides tariff parity with competing food wheat suppliers.

Tree Nuts & Peanuts: In 2025, Japan imported \$428 million of tree nuts. Tree nuts are increasing in popularity especially in the convenience health snack sector. Almonds, walnuts, pecans, and peanuts, in plain, roasted, and salted forms, are common in single-serve snack packaging at convenience stores.

Cheese Products: Consumers are taking advantage of expanded retail options in supermarkets. Popular processed products include sliced cheese, cheese sticks, and bite-sized cheese wedges.

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 ground seasoned pork (GSP) is a key ingredient for domestic sausage manufacturers.

Potential Products Not Present in Market but which have Good Sales

Frozen bread: These products are in demand, but these are difficult to package and ship frozen.

Potential Product Not Present Because They Face Significant Barriers

Peaches: The United States does not have fresh peach market access into Japan. The United States is currently under negotiation with Japan on fresh peach market access. Once granted, U.S. peaches may gain additional demands and opportunities in the Japanese market.

Section 5: Key Contacts and Further Information

Ministry of Health, Labor and Welfare

Imported Food Safety: [Imported Food Safety | Ministry of Health, Labour and Welfare](#)

Japan Food Sanitation Law: [Food Sanitation Act - English - Japanese Law Translation](#)

U.S. laboratories approved by the Japanese Government:

[Ministry of Health: List of Foreign Official Laboratories](#)

Japan External Trade Organization (JETRO)

[Japanese Market Regulations](#)

Specifications and Standards for Foods, Food Additives, etc. under the Food Sanitation Law:

[JETRO | Japan External Trade Organization](#): Search with “food import regulation”

USDA Japan

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 [USDA Japan Reports website](#).

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<http://www.fas.usda.gov>

Attachments: [Attachement 1 Retail Category Definitions.docx](#)