

JAPAN

KEY STATISTICS



LAND AREA
377,975 km²



CAPITAL CITY
TOKYO



LANGUAGES
JAPANESE



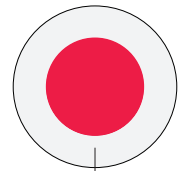
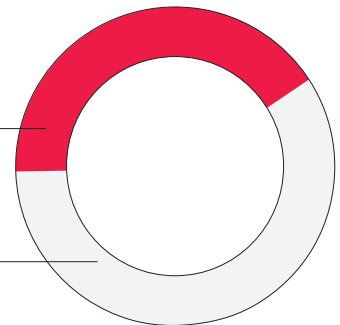
CURRENCY
YEN (JPY)

URBAN RESIDENTS

113,712,000

RURAL RESIDENTS

9,888,000



- Japan plays a significant role in international trade
- The Japan-Australia Economic Partnership Agreement (JAEPA) is a key agreement facilitating trade and investment between the two countries
- Japan is a major trading partner for Australia, with highly complementary economies
- JAEPA aims to eliminate or reduce barriers to trade in goods and services between Australia and Japan, providing preferential access for Australian exporters and supporting growth in two-way investment
- JAEPA is one of Australia's most utilised trade agreements
- Market access for Australian berries to Japan is currently from Tasmania only

TOTAL POPULATION **123.6m**

POPULATION DENSITY RANKED **#25 IN WORLD** AT **330 PER km²**

MEDIAN AGE **49.4 YEARS** AND **STEADILY INCREASING**

92% URBAN POPULATION

ETHNICITY: 98% ETHNIC JAPANESE

ECONOMY

- Japan's economy has seen positive nominal GDP growth in the past couple of years, more than doubling the growth rate from the previous decade
- Headline inflation has been at or above 2% for over two years, exceeding the Bank of Japan's target for an extended period, driven by rising energy and food prices
- Wage growth has reached a 30-year high, which is a positive sign for consumer spending and economic activity
- Japan faces a shrinking and ageing population, leading to labour shortages and putting strain on social security systems

POLITICAL ENVIRONMENT

- Japan is a democratic, constitutional monarchy with a parliamentary government
- Japan's parliament is known as the Diet and comprises a House of Representatives (Lower House) and a House of Councillors (Upper House)
- Executive power is vested in the Cabinet, which comprises the Prime Minister and other members known as Ministers of State
- Japan's governmental structure has three tiers: national, prefectural and local, there are 47 prefectures and 1,741 local municipalities and each tier is governed by elected assemblies

CONNECTIVITY

- Japan has one of the most advanced and efficient trade infrastructures in the world, designed to support its position as a major global trading nation
- Trade infrastructure and technology is highly modernised
- Japan maintains a comprehensive and reliable cold chain for food imports, critical for fresh produce
- Major airports like **Narita (Tokyo)** and **Kansai (Osaka)** offer temperature-controlled cargo handling and daily international freight routes

2025 CULTURAL HOLIDAYS

New Year (Shōgatsu): January 1-3
Hinamatsuri (Doll's Festival): March 3
Cherry Blossom Season (Hanami): Late March to Early April
Golden Week: April 29 to May 5
Tanabata (Star Festival): July 7 (varies by region)
Obon: Mid-August (Aug 13-15 or mid-July in some regions)
Tsukimi (Moon Viewing Festival): September (varies by lunar calendar)
Respect for the Aged Day (Keirō no Hi): Third Monday of September
Autumn Festivals (Aki Matsuri): September to November
Christmas: December 24 - 25

THE JAPANESE CONSUMER

Japanese consumers value high-quality, well-designed products, prefer trusted brands, and are drawn to goods that offer attention to detail, reliability, and cultural harmony



KEY INSIGHTS

URBAN AND AGEING: Japan is one of the oldest and urbanised populations globally, with a median age of ~49 years

SHRINKING HOUSEHOLDS: An increase in singles, couples without children, and elderly living alone is changing purchasing habits

QUALITY-CENTRIC: Japanese consumers prioritise high quality, food safety, and reliability over low price

BRAND TRUST: They prefer trusted brands and are willing to pay a premium for assured quality

DETAIL MATTERS: Packaging, presentation and customer service are crucial; meticulous attention to detail is expected

ECO-AWARE: Interest in eco-friendly products, minimal packaging, and sustainable sourcing is increasing

HEALTH-CONSCIOUS: Strong trend toward health, wellness, and organic or natural products




TRADITIONAL FOOD SHOPPERS: Despite digital growth, many Japanese still prefer shopping in-store for fresh foods, especially produce, seafood, and prepared meals

BERRY TRADE 2024

- Japan is the world's sixth-largest importer of fresh fruit, with one-third of its domestic supply reliant on imports
- It's key trading partners in the fresh food category are the USA (driven by scale, reliability, safety standards), China (driven by cost competitiveness & proximity) and Canada (driven by quality & trusted export systems)
- Bananas are Japan's most heavily imported fruit, comprising about 65.1% of all fresh fruit imports by value

MARKET ACCESS FOR AUSTRALIAN BERRIES TO JAPAN IS CURRENTLY FROM TASMANIA ONLY

BERRY TRADE 2024

EXPORTER COUNTRY	2024 SHARE %	5YR AVG SHARE %	TOTAL VOLUME IMPORTED
USA	80.4%	85.7%	 2,840 tonnes HS081010
Netherlands	15.0%	12.2%	
UK	4.3%	1.6%	
Mexico	58.4%	52.0%	 1,895 tonnes HS081040
USA	23.9%	28.4%	
Chile	14.2%	17.4%	
Canada	2.2%	2.0%	
USA	66.0%	61.0%	 438 tonnes HS081020
Mexico	34.0%	38.9%	

MAINSTREAM RETAIL

Konbini (convenience stores) are arguably the essence of Japanese mainstream retail and there are over **55,700** stores as of end-2024 accounting for ~18 % of total food & beverage retail sales

The 'Big Three' - **7-ELEVEN** (21,743 stores), **FAMILYMART** (16,310 stores), **LAWSON** (14,671 stores) - control ~90 % of this sector in Japan



Leading supermarket groups like **AEON**, **ITO YOKADO**, **LIFE** and the Walmart-owned **SEIYU** dominate mid-size food retail and hypermarkets



AEON GROUP owns supermarket chains such as **Aeon**, **MaxValu**, **Maruetsu**, **My Basket**, and others, across a massive 20,008 retail outlets

OPPORTUNITIES

- Japan's domestic berry season peaks in winter to early spring (Dec-March), allowing Australian exporters to fill market gaps during Japan's low-production months
- Japan has a large premium retail segment and affluent consumers who are willing to pay a higher price for quality imports, especially in department store food halls, high-end supermarkets and gift markets
- Rising interest in health & wellness, functional foods and low-calorie snacks and desserts make berries a perfect fit for these dietary trends, especially among urban, female, and younger consumers

CHALLENGES

- Japanese consumers often favour locally grown fruits and vegetables, making it challenging for imported products to compete
- Stringent biosecurity and phytosanitary requirements mean that import permits, pre-clearance protocols and approved treatment methods are usually required
- Japanese consumers and buyers alike are exceptionally quality-conscious, and aesthetic presentation is critical with packaging tailored to Japanese preferences. Even minor quality issues can lead to the rejection of entire shipments
- The distance between countries can affect shelf life, and airfreight is costly so to compete with well-established suppliers of premium products such as USA and NZ, Australian exporters must offer a compelling value proposition i.e. superior quality, seasonal advantage or niche differentiation

FOOD SERVICES

- The food service market size is estimated at 289.2 billion USD in 2025, and is expected to reach 473.4 billion USD by 2030
- Tokyo's food service industry blends tradition and innovation, boasting over 200 Michelin-starred restaurants and holding its place as a global culinary capital
- Japan's food industry is one of the country's largest, driven by both its young and elderly populations. It is highly competitive, with local and foreign travelers demanding innovative, high-quality products
- Dining out is an important part of Japanese culture. Consumers prefer to conduct both social and business meetings in restaurants due to the time-pressed schedules and increasing frequency of dining

E-COMMERCE

- Online grocery shopping in Japan is growing, driven by urban convenience, an ageing population's need for home delivery, and a tech-integrated lifestyle
- Growth of online grocery platforms is limited by language barriers for foreigners, delivery area restrictions, and consumers' enduring preference to hand-pick fresh produce and seafood

MAJOR CHAIN ONLINE PLATFORMS

- **Rakuten Seiyu NetSuper**: A collaboration between Rakuten and Walmart-owned Seiyu, it stands out as one of Japan's leading online grocery retailers
- **Amazon Fresh (Japan)**: Entered the online grocery sector in Japan with Amazon Fresh in 2016, and continues to be a major presence in the online grocery space
- **Aeon Online**: Launched its online grocery platform around 2018

TIPS FOR SUCCESS

- Prioritise quality and consistency by ensuring superior freshness, perfect appearance and consistency of all consignments
- The Japanese are very relationship-oriented in business and you need to build trust through long-term engagement, and being early shows respect and reliability
- Ensure strict compliance with biosecurity, labelling and documentation protocols
- Check that your product has market access and meets all quarantine requirements
- Use Australia's clean image and food safety record to your advantage and share the origin, farming methods, and sustainability credentials to appeal to Japan's premium market segments
- Respect the etiquette of the Japanese; relationship-building can take months or years before deals are struck and definitely avoid hard selling