



MARKET ACCESS SECRETARIAT  
Global Analysis Report

# Competitive Trade Analysis

## Japan

August 2015



### REPORT CONTENT SUMMARY

- This report looks to highlight the major sectors in Japan, and attempts to identify the best opportunities for Canadian exports.
- Specifically, the data analysis that follows focuses on the top ten Japanese imports by major aggregate sector, of which Canada is a supplier. It identifies the gap between Japan's imports from the world and the proportion provided by Canada, and then outlines top international competitors.
- Unless otherwise specified, all figures in this document are based on import data as reported by Japan's Ministry of Finance, and were sourced from Global Trade Atlas (2015).

### JAPANESE MARKET SUMMARY

- Japan is the world's fourth-largest importer of agri-food and seafood products with a value of C\$81.2 billion in 2014. The country recorded a significant trade deficit of C\$75.4 billion in 2014, exporting just C\$5.8 billion of agri-food and seafood products.
- Top agri-food and seafood suppliers include the United States with 22.55% of total import value, China (13.5%), and Thailand (5.8%). Following a third place ranking in 2012 and 2013, Canada dropped to fourth in 2014, representing 5.8% or C\$4.7 billion.
- Japan's agri-food and seafood imports from Canada have been increasing at a marginally slower rate than Japan's imports from the world. This has resulted in a widening supply gap not only overall, but among all ten of Japan's top import commodities.

*Note: Please see the Annex at the end of this document for a list of abbreviations that will be used throughout this report.*

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## TRADE OVERVIEW

Japan is the fourth-largest importer of agri-food and seafood products in the world, and is highly reliant on imports to sustain domestic demand. The country recorded an agri-food and seafood trade deficit of C\$75.4 billion in 2014, with imports valued at C\$81.2 billion and C\$5.8 billion in exports. Sourcing a diverse range of agri-food and seafood products from international suppliers, key import commodities include fish and crustaceans (15.5% of total imports), meat (13.1%), and cereals (9.4%). The top three supplying countries of overall agri-food and seafood imports are the United States, China, and Thailand. Canada is ranked fourth among the top ten supplying countries to Japan, but registered a decrease in market share in 2014.

**Japan's Top Ten Suppliers of Agri-Food and Seafood Products, C\$ Millions**

Country		2010	2011	2012	2013	2014	CAGR % 2010-14
<b>World</b>		<b>69,774.71</b>	<b>82,759.13</b>	<b>83,753.86</b>	<b>78,800.61</b>	<b>81,198.99</b>	<b>3.86</b>
1	United States	16,471.99	19,245.48	18,390.14	16,203.68	18,312.31	2.68
2	China	9,067.19	10,299.47	11,215.25	10,429.60	10,950.90	4.83
3	Thailand	4,062.15	5,030.00	5,022.98	4,597.15	4,728.08	3.87
4	Canada	4,101.61	4,954.51	5,165.39	4,796.40	4,677.23	3.34
5	Australia	4,614.98	5,216.47	5,049.74	4,702.33	4,577.45	-0.20
6	Brazil	2,752.22	3,749.20	3,692.93	4,381.86	3,421.66	5.59
7	South Korea	1,879.63	2,256.73	2,356.09	2,143.76	2,301.50	5.19
8	Netherlands	1,962.33	2,852.99	2,814.83	2,698.09	2,288.14	3.91
9	France	1,737.95	1,923.09	2,017.97	1,985.18	2,168.37	5.69
10	Chile	1,721.88	2,158.81	2,228.41	1,909.54	2,147.04	5.67

**Japan's Top Ten Suppliers of Agri-Food and Seafood Products, % Share**

Country		2010	2011	2012	2013	2014	PP Change 2010-14
1	United States	23.61	23.25	21.96	20.56	22.55	-1.06
2	China	12.99	12.45	13.39	13.24	13.49	0.50
3	Thailand	5.82	6.08	6.00	5.83	5.82	0.00
4	Canada	5.88	5.99	6.17	6.09	5.76	-0.12
5	Australia	6.61	6.30	6.03	5.97	5.64	-0.97
6	Brazil	3.94	4.53	4.41	5.56	4.21	0.27
7	South Korea	2.69	2.73	2.81	2.72	2.83	0.14
8	Netherlands	2.81	3.45	3.36	3.42	2.82	0.01
9	France	2.49	2.32	2.41	2.52	2.67	0.18
10	Chile	2.47	2.61	2.66	2.42	2.64	0.17



Canada has a large supply gap with Japan, despite being its fourth-largest supplier of agri-food and seafood products. Japan has fairly minimal domestic production due to limited land space and a large population, and thus presents export opportunities simply by way of sustained demand. Japan has a diverse supplier list for agri-food and seafood products, totaling 190 countries in 2014, but the top five players represent a combined 53.6% of the market, signalling a relatively concentrated environment in terms of suppliers.

#### Agri-Food and Seafood Products Supply Gap, C\$ Millions

	2010	2011	2012	2013	2014	CAGR % 2010-14
Japan's imports from the world	69,774.71	82,759.13	83,753.86	78,800.61	81,198.99	3.86
Japan's imports from Canada	4,101.61	4,954.51	5,165.39	4,796.40	4,677.23	3.34
Supply gap	65,673.10	77,804.63	78,588.46	74,004.21	76,521.76	3.90

Fish and crustaceans represented Japan's top-grossing import commodity in 2014, with a value of C\$12.6 billion, or 15.5% of overall agri-food and seafood imports. However, across the 2010 to 2014 period, fish and crustaceans was the worst performer in terms of value sales growth, with a compound annual growth rate (CAGR) of just 1.14%. In contrast, the smaller categories of beverages, preserved food, and prepared meat and fish posted the strongest value sales growth rates over the same period with 7.4%, 5.7% and 5.4%, respectively.

#### Japan's Top Ten Agri-Food and Seafood Commodity Imports from the World, C\$ Millions

Rank	HS Code	Commodity	2010	2011	2012	2013	2014	CAGR % 2010-14
<b>Total Agri-Food and Seafood Imports</b>			<b>69,774.71</b>	<b>82,759.13</b>	<b>83,753.86</b>	<b>78,800.61</b>	<b>81,198.99</b>	<b>3.86</b>
1	03	Fish and crustaceans	12,031.16	13,473.23	13,935.87	12,212.01	12,590.91	1.14
2	02	Meat and edible offal	8,800.98	10,213.36	9,898.54	9,014.44	10,609.51	4.78
3	10	Cereals	7,140.57	9,534.73	8,713.02	8,838.93	7,669.40	1.80
4	16	Prepared meat and fish	5,416.89	6,477.30	7,039.45	6,582.21	6,678.91	5.38
5	12	Oilseeds	4,929.05	5,393.85	5,801.70	5,929.17	5,874.83	4.49
6	22	Beverages	2,947.16	3,444.77	3,701.79	3,651.73	3,921.22	7.40
7	20	Preserved food	3,094.95	3,686.31	4,010.83	3,860.34	3,860.97	5.68
8	23	Food waste and animal feed	3,100.65	3,043.82	3,217.68	3,196.77	3,457.35	2.76
9	08	Edible fruit and nuts	2,792.89	2,950.04	3,207.22	3,061.13	3,306.89	4.31
10	07	Vegetables	2,214.53	2,498.00	2,694.41	2,585.97	2,699.17	5.07



## TOP TEN AGRI-FOOD AND SEAFOOD COMMODITY IMPORTS

### 1. FISH AND CRUSTACEANS

Japan's Top Ten Suppliers of Fish and Crustaceans, C\$ Millions

Country	2010	2011	2012	2013	2014	CAGR % 2010-14
<b>World</b>	<b>12,031.16</b>	<b>13,473.23</b>	<b>13,935.87</b>	<b>12,212.01</b>	<b>12,590.91</b>	<b>1.14</b>
Chile	1,129.42	1,498.18	1,520.06	1,207.57	1,415.35	5.80
United States	1,247.58	1,339.43	1,428.30	1,168.93	1,333.54	1.68
Russia	1,203.96	1,415.58	1,515.05	1,263.94	1,235.33	0.65
China	1,142.13	1,268.91	1,257.41	1,162.15	1,218.98	1.64
Norway	787.37	895.12	917.30	815.05	953.06	4.89
Vietnam	599.87	596.04	626.87	615.84	670.55	2.82
Indonesia	656.07	686.05	703.61	686.95	637.37	-0.72
South Korea	717.06	754.13	753.01	644.82	617.60	-3.66
Taiwan	657.28	649.36	629.66	450.56	516.16	-5.86
India	362.61	415.83	355.21	427.87	483.29	7.45
(11) Canada	466.36	449.23	468.42	400.98	455.41	-0.59

Japan's Top Ten Suppliers of Fish and Crustaceans, % Share

Country	2010	2011	2012	2013	2014	PP Change 2010-14
Chile	9.39	11.12	10.91	9.89	11.24	1.85
United States	10.37	9.94	10.25	9.57	10.59	0.22
Russia	10.01	10.51	10.87	10.35	9.81	-0.20
China	9.49	9.42	9.02	9.52	9.68	0.19
Norway	6.54	6.64	6.58	6.67	7.57	1.03
Vietnam	4.99	4.42	4.50	5.04	5.33	0.34
Indonesia	5.45	5.09	5.05	5.63	5.06	-0.39
South Korea	5.96	5.60	5.40	5.28	4.91	-1.05
Taiwan	5.46	4.82	4.52	3.69	4.10	-1.36
India	3.01	3.09	2.55	3.50	3.84	0.83
(11) Canada	3.88	3.33	3.36	3.28	3.62	-0.26

Fish and Crustaceans Supply Gap, C\$ Millions

	2010	2011	2012	2013	2014	CAGR % 2010-14
Japan's imports from the world	12,031.16	13,473.23	13,935.87	12,212.01	12,590.91	1.14
Japan's imports from Canada	466.36	449.23	468.42	400.98	455.41	-0.59
Supply gap	11,564.80	13,024.00	13,467.44	11,811.03	12,135.50	1.21



**Japan's Top Five Fish and Crustacean Product Imports, C\$ Millions**

HS Code	Product Description	2012	2013	2014	CAGR % 2012-14
030617	Frozen shrimp and prawns	1,905.82	2,005.34	2,009.64	2.69
030499	Frozen fish meat, not elsewhere specified	651.81	520.48	616.34	-2.76
030487	Frozen tuna fillets (skipjack/ stripe-bellied bonito)	687.50	643.71	609.17	-5.87
030489	Frozen fish fillets	682.66	533.44	602.34	-6.07
030344	Frozen bigeye tuna, excluding fillets, livers and roes	712.10	487.04	564.08	-11.00

**Japan's Top Five Fish and Crustacean Product Imports and Top Supplying Countries, 2014**

HS Code	Product Description	Market Share %			Canada's % Share
		1	2	3	
030617	Frozen shrimp and prawns	Vietnam 24.45	Indonesia 19.53	India 19.44	0.02
030499	Frozen fish meat, not elsewhere specified	Thailand 20.05	Norway 15.85	India 12.47	0.36
030487	Frozen tuna fillets (skipjack/ stripe-bellied bonito)	South Korea 23.63	Malta 11.89	China 11.37	0.01
030489	Frozen fish fillets	Norway 36.01	China 14.00	New Zealand 8.49	0.35
030344	Frozen bigeye tuna, excluding fillets, livers and roes	Taiwan 49.22	China 19.95	South Korea 7.62	N/A



## 2. MEAT AND EDIBLE OFFAL

**Japan's Top Ten Suppliers of Meat and Edible Offal, C\$ Millions**

Country	2010	2011	2012	2013	2014	CAGR % 2010-14
<b>World</b>	<b>8,800.98</b>	<b>10,213.36</b>	<b>9,898.54</b>	<b>9,014.44</b>	<b>10,609.51</b>	<b>4.78</b>
United States	2,571.12	3,115.40	3,222.50	3,065.40	3,436.89	7.53
Australia	1,834.31	1,934.10	1,853.42	1,666.78	1,918.89	1.13
Brazil	1,040.54	1,464.75	1,098.32	1,088.62	1,238.25	4.44
Canada	1,232.78	1,268.16	1,276.27	926.98	1,030.43	-4.38
Denmark	822.74	851.30	769.65	631.01	752.97	-2.19
Mexico	324.07	364.76	423.42	441.65	463.64	9.37
Spain	103.58	172.96	192.13	210.62	395.01	39.74
New Zealand	214.16	238.46	237.64	230.64	236.26	2.49
Thailand	<0.01	-	-	0.02	175.65	1,416.27
Chile	166.12	213.36	207.87	175.98	164.76	-0.20

**Japan's Top Ten Suppliers of Meat and Edible Offal, % Share**

Country	2010	2011	2012	2013	2014	PP Change 2010-14
United States	29.21	30.50	32.56	34.01	32.39	3.18
Australia	20.84	18.94	18.72	18.49	18.09	-2.75
Brazil	11.82	14.34	11.10	12.08	11.67	-0.15
Canada	14.01	12.42	12.89	10.28	9.71	-4.30
Denmark	9.35	8.34	7.78	7.00	7.10	-2.25
Mexico	3.68	3.57	4.28	4.90	4.37	0.69
Spain	1.18	1.69	1.94	2.34	3.72	2.54
New Zealand	2.43	2.33	2.40	2.56	2.23	-0.20
Thailand	<0.01	0.00	0.00	<0.01	1.66	1.66
Chile	1.89	2.09	2.10	1.95	1.55	-0.34

**Meat and Edible Offal Supply Gap, C\$ Millions**

	2010	2011	2012	2013	2014	CAGR % 2010-14
Japan's imports from the world	8,800.98	10,213.36	9,898.54	9,014.44	10,609.51	4.78
Japan's imports from Canada	1,232.78	1,268.16	1,276.27	926.98	1,030.43	-4.38
Supply gap	7,568.20	8,945.20	8,622.27	8,087.47	9,579.08	6.07



**Japan's Top Five Meat and Edible Offal Product Imports, C\$ Millions**

HS Code	Product Description	2012	2013	2014	CAGR % 2012-14
020329	Frozen pork	3,404.68	2,472.83	2,971.38	-6.58
020319	Fresh/chilled pork	1,706.41	1,634.45	1,795.07	2.56
020130	Fresh/chilled boneless beef	1,512.56	1,491.63	1,751.11	7.60
020714	Frozen chicken cuts and edible offal	1,177.43	1,143.76	1,452.35	11.06
020230	Frozen boneless beef	1,237.54	1,299.33	1,415.77	6.96

**Japan's Top Five Meat and Edible Offal Product Imports and Top Supplying Countries, 2014**

HS Code	Product Description	Market Share %			Canada's % Share
		1	2	3	
020329	Frozen pork	Denmark 25.22	United States 16.85	Spain 12.61	8.59
020319	Fresh/chilled pork	United States 62.78	Canada 33.4	Mexico 3.76	33.4
020130	Fresh/chilled boneless beef	Australia 53.11	United States 41.80	New Zealand 2.79	0.82
020714	Frozen chicken cuts and edible offal	Brazil 83.08	Thailand 11.19	United States 4.28	N/A
020230	Frozen boneless beef	Australia 48.92	United States 36.85	New Zealand 7.21	3.87



### 3. CEREALS

**Japan's Top Ten Suppliers of Cereals, C\$ Millions**

Country	2010	2011	2012	2013	2014	CAGR % 2010-14
<b>World</b>	<b>7,140.57</b>	<b>9,534.73</b>	<b>8,713.02</b>	<b>8,838.93</b>	<b>7,669.40</b>	<b>1.80</b>
United States	5,147.59	6,695.59	5,322.36	3,936.34	5,147.47	0.00
Canada	428.00	804.66	751.71	778.04	827.07	17.90
Australia	634.22	1,083.48	1,004.73	921.06	600.25	-1.37
Brazil	153.70	304.49	617.84	1,384.12	337.05	21.69
Ukraine	65.64	0.04	307.90	281.45	235.40	37.61
Argentina	352.35	311.48	340.27	966.06	173.60	-16.22
Thailand	185.43	174.40	137.66	158.26	163.00	-3.17
South Africa	4.24	43.55	0.06	241.07	47.46	82.91
Russia	10.59	5.76	6.87	0.62	30.31	30.05
Romania	-	16.55	30.54	37.55	27.80	N/C

**Japan's Top Ten Suppliers of Cereals, % Share**

Country	2010	2011	2012	2013	2014	PP Change 2010-14
United States	72.09	70.22	61.09	44.53	67.12	-4.97
Canada	5.99	8.44	8.63	8.80	10.78	4.79
Australia	8.88	11.36	11.53	10.42	7.83	-1.05
Brazil	2.15	3.19	7.09	15.66	4.39	2.24
Ukraine	0.92	<0.01	3.53	3.18	3.07	2.15
Argentina	4.93	3.27	3.91	10.93	2.26	-2.67
Thailand	2.60	1.83	1.58	1.79	2.13	-0.47
South Africa	0.06	0.46	<0.01	2.73	0.62	0.56
Russia	0.15	0.06	0.08	0.01	0.40	0.25
Romania	0.00	0.17	0.35	0.42	0.36	0.36

**Cereals Supply Gap, C\$ Millions**

	2010	2011	2012	2013	2014	CAGR % 2010-14
Japan's imports from the world	7,140.57	9,534.73	8,713.02	8,838.93	7,669.40	1.80
Japan's imports from Canada	428.00	804.66	751.71	778.04	827.07	17.90
Supply gap	6,712.57	8,730.07	7,961.31	8,060.88	6,842.33	0.48





**Japan's Top Five Cereal Product Imports, C\$ Millions**

HS Code	Product Description	2012	2013	2014	CAGR % 2012-14
100590	Corn (maize)	5,098.97	4,885.30	4,255.25	-8.65
100199	Non-durum wheat	2,063.70	2,264.72	2,076.59	0.31
100630	Semi- or wholly-milled rice	429.04	491.84	459.88	3.53
100390	Barley	411.68	451.48	398.77	-1.58
100790	Grain sorghum	474.33	546.18	244.61	-28.19

**Japan's Top Five Cereal Product Imports and Top Supplying Countries, 2014**

HS Code	Product Description	Market Share %			Canada's % Share
		1	2	3	
100590	Corn (maize)	United States 84.50	Brazil 7.89	Ukraine 5.53	<0.01
100199	Non-durum wheat	United States 53.43	Canada 28.89	Australia 16.89	28.89
100630	Semi- or wholly-milled rice	United States 61.57	Thailand 34.48	Australia 2.88	N/A
100390	Barley	Australia 52.69	Canada 26.80	United States 12.38	26.80
100790	Grain sorghum	Argentina 63.97	United States 35.63	India 0.17	N/A



#### 4. PREPARED MEAT AND FISH

**Japan's Top Ten Suppliers of Prepared Meat and Fish, C\$ Millions**

Country	2010	2011	2012	2013	2014	CAGR % 2010-14
<b>World</b>	<b>5,416.89</b>	<b>6,477.30</b>	<b>7,039.45</b>	<b>6,582.21</b>	<b>6,678.91</b>	<b>5.38</b>
China	2,590.22	3,117.41	3,313.57	2,922.30	2,947.27	3.28
Thailand	1,566.27	1,863.45	2,085.56	2,030.45	1,906.63	5.04
United States	416.48	493.74	545.10	570.17	617.08	10.33
Vietnam	212.92	267.94	287.61	326.00	405.06	17.44
Indonesia	143.84	179.00	214.00	192.65	201.49	8.79
South Korea	102.54	122.90	137.67	106.91	117.63	3.49
Canada	55.65	63.61	66.49	71.06	99.42	15.61
Philippines	43.34	54.61	71.50	69.04	62.94	9.78
Australia	43.06	46.31	49.38	38.26	42.58	-0.28
Italy	15.06	20.59	23.23	25.13	28.83	17.64

**Japan's Top Ten Suppliers of Prepared Meat and Fish, % Share**

Country	2010	2011	2012	2013	2014	PP Change 2010-14
China	47.82	48.13	47.07	44.40	44.13	-3.69
Thailand	28.91	28.77	29.63	30.85	28.55	-0.36
United States	7.69	7.62	7.74	8.66	9.24	1.55
Vietnam	3.93	4.14	4.09	4.95	6.06	2.13
Indonesia	2.66	2.76	3.04	2.93	3.02	0.36
South Korea	1.89	1.90	1.96	1.62	1.76	-0.13
Canada	1.03	0.98	0.94	1.08	1.49	0.46
Philippines	0.80	0.84	1.02	1.05	0.94	0.14
Australia	0.79	0.72	0.70	0.58	0.64	-0.15
Italy	0.28	0.32	0.33	0.38	0.43	0.15

**Prepared Meat and Fish Supply Gap, C\$ Millions**

	2010	2011	2012	2013	2014	CAGR % 2010-14
Japan's imports from the world	5,416.89	6,477.30	7,039.45	6,582.21	6,678.91	5.38
Japan's imports from Canada	55.65	63.61	66.49	71.06	99.42	15.61
Supply gap	5,361.25	6,413.69	6,972.96	6,511.16	6,579.49	5.25



**Japan's Top Five Prepared Meat and Fish Product Imports, C\$ Millions**

HS Code	Product Description	2012	2013	2014	CAGR % 2012-14
160232	Prepared/preserved chicken meat or offal	2,234.75	2,193.43	2,143.44	-2.06
160521	Prepared/preserved shrimp and prawns (not in airtight container)	805.19	794.45	792.52	-0.79
160242	Prepared/preserved pork shoulders and cuts of pork	387.43	421.79	532.33	17.22
160419	Prepared/preserved fish, not minced	573.81	506.58	530.23	-3.87
160414	Prepared/preserved tuna/skipjack/bonito, not minced	366.47	349.18	328.23	-5.36

**Japan's Top Five Prepared Meat and Fish Product Imports and Top Supplying Countries, 2014**

HS Code	Product Description	Market Share %			Canada's % Share
		1	2	3	
160232	Prepared/preserved chicken meat or offal	Thailand 50.00	China 49.45	South Korea 0.20	N/A
160521	Prepared/preserved shrimp and prawns (not in airtight container)	Thailand 42.91	Vietnam 34.34	China 9.17	1.10
160242	Prepared/preserved pork shoulders and cuts of pork	United States 73.14	Canada 14.36	China 4.00	14.36
160419	Prepared/preserved fish, not minced	China 76.08	Thailand 9.47	Vietnam 7.65	N/A
160414	Prepared/preserved tuna/skipjack/bonito, not minced	Thailand 60.81	Indonesia 19.34	Philippines 15.75	N/A



## 5. OILSEEDS

*\*including seeds for sowing and fodder*

### Japan's Top Ten Suppliers of Oilseeds, C\$ Millions

Country	2010	2011	2012	2013	2014	CAGR % 2010-14
<b>World</b>	<b>4,929.05</b>	<b>5,393.85</b>	<b>5,801.70</b>	<b>5,929.17</b>	<b>5,874.83</b>	<b>4.49</b>
United States	1,964.07	1,889.53	1,960.48	1,926.84	2,021.85	0.73
Canada	1,442.77	1,832.02	2,038.05	2,061.20	1,718.60	4.47
China	385.52	505.67	539.68	514.75	578.85	10.70
Brazil	267.29	301.35	358.59	413.64	396.09	10.33
Australia	326.28	277.59	299.75	377.94	350.77	1.83
Nigeria	63.61	60.69	66.22	72.18	120.98	17.44
South Korea	69.16	105.89	102.52	82.47	97.77	9.04
Tanzania	34.34	26.53	32.98	22.12	78.69	23.04
Chile	33.33	33.43	40.72	44.21	51.22	11.34
Paraguay	28.20	63.33	34.80	48.63	50.12	15.47

### Japan's Top Ten Suppliers of Oilseeds, % Share

Country	2010	2011	2012	2013	2014	PP Change 2010-14
United States	39.85	35.03	33.79	32.50	34.42	-5.43
Canada	29.27	33.97	35.13	34.76	29.25	-0.02
China	7.82	9.37	9.30	8.68	9.85	2.03
Brazil	5.42	5.59	6.18	6.98	6.74	1.32
Australia	6.62	5.15	5.17	6.37	5.97	-0.65
Nigeria	1.29	1.13	1.14	1.22	2.06	0.77
South Korea	1.40	1.96	1.77	1.39	1.66	0.26
Tanzania	0.70	0.49	0.57	0.37	1.34	0.64
Chile	0.68	0.62	0.70	0.75	0.87	0.19
Paraguay	0.57	1.17	0.60	0.82	0.85	0.28

### Oilseeds Supply Gap, C\$ Millions

	2010	2011	2012	2013	2014	CAGR % 2010-14
Japan's imports from the world	4,929.05	5,393.85	5,801.70	5,929.17	5,874.83	4.49
Japan's imports from Canada	1,442.77	1,832.02	2,038.05	2,061.20	1,718.60	4.47
Supply gap	3,486.28	3,561.83	3,763.66	3,867.98	4,156.23	4.49



**Japan's Top Five Oilseeds Product Imports, C\$ Millions**

HS Code	Product Description	2012	2013	2014	CAGR % 2012-14
120190	Soybeans	1,803.86	1,937.49	2,037.41	6.28
120510	Canola seeds	1,682.81	1,733.13	1,413.41	-8.35
121490	Forage products (including rutabagas, fodder roots, hay, clover, kale, etc.)	999.97	956.45	869.89	-6.73
120740	Sesame seeds	240.78	274.89	420.14	32.09
121190	Fresh/dried plants and plant parts used for perfumery, pharmacy, insecticides, etc.	211.59	232.97	251.61	9.05

**Japan's Top Five Oilseeds Product Imports and Top Supplying Countries, 2014**

HS Code	Product Description	Market Share %			Canada's % Share
		1	2	3	
120190	Soybeans	United States 63.01	Brazil 19.05	Canada 15.58	15.58
120510	Canola seeds	Canada 92.38	Australia 7.62	Poland <0.01	92.38
121490	Forage products (including rutabagas, fodder roots, hay, clover, kale, etc.)	United States 75.15	Australia 17.59	Canada 6.75	6.75
120740	Sesame seeds	Nigeria 28.79	Tanzania 18.65	Paraguay 11.88	N/A
121190	Fresh/dried plants and plant parts used for perfumery, pharmacy, insecticides, etc.	China 77.16	India 4.85	Thailand 3.72	0.03



## 6. BEVERAGES

*\*does not include juices*

### Japan's Top Ten Suppliers of Beverages, C\$ Millions

Country	2010	2011	2012	2013	2014	CAGR % 2010-14
<b>World</b>	<b>2,947.16</b>	<b>3,444.77</b>	<b>3,701.79</b>	<b>3,651.73</b>	<b>3,921.22</b>	<b>0.07</b>
France	1,039.63	1,122.70	1,166.13	1,143.29	1,218.24	0.04
United States	359.06	403.31	458.84	468.69	467.92	0.07
Brazil	290.75	317.11	248.53	261.41	363.89	0.06
South Korea	274.22	388.39	374.70	327.52	350.79	0.06
Italy	176.05	208.81	239.87	257.34	284.42	0.13
United Kingdom	171.13	225.73	218.54	189.77	217.78	0.06
Chile	92.74	108.18	142.37	176.72	212.73	0.23
Spain	86.61	95.47	124.14	135.76	149.53	0.15
Switzerland	9.77	40.89	57.50	65.55	89.94	0.74
Pakistan	24.18	79.08	107.20	93.22	78.28	0.34
(22) Canada	15.47	26.74	27.37	24.91	16.89	0.02

### Japan's Top Ten Suppliers of Beverages, % Share

Country	2010	2011	2012	2013	2014	PP Change 2010-14
France	35.28	32.59	31.50	31.31	31.07	-4.21
United States	12.18	11.71	12.40	12.83	11.93	-0.25
Brazil	9.87	9.21	6.71	7.16	9.28	-0.59
South Korea	9.30	11.27	10.12	8.97	8.95	-0.35
Italy	5.97	6.06	6.48	7.05	7.25	1.28
United Kingdom	5.81	6.55	5.90	5.20	5.55	-0.26
Chile	3.15	3.14	3.85	4.84	5.43	2.28
Spain	2.94	2.77	3.35	3.72	3.81	0.87
Switzerland	0.33	1.19	1.55	1.79	2.29	1.96
Pakistan	0.82	2.30	2.90	2.55	2.00	1.18
(22) Canada	0.52	0.78	0.74	0.68	0.43	-0.09

### Beverages Supply Gap, C\$ Millions

	2010	2011	2012	2013	2014	CAGR % 2010-14
Japan's imports from the world	2,947.16	3,444.77	3,701.79	3,651.73	3,921.22	0.07
Japan's imports from Canada	15.47	26.74	27.37	24.91	16.89	0.02
Supply gap	2,931.70	3,418.04	3,674.42	3,626.81	3,904.33	7.43



### Japan's Top Five Beverage Product Imports, C\$ Millions

HS Code	Product Description	2012	2013	2014	CAGR % 2012-14
220421	Wine of fresh grapes, <2 litres	1,045.49	1,089.96	1,171.20	5.84
220410	Sparkling wine of fresh grapes	430.87	420.43	514.96	9.32
220710	Ethyl alcohol, >80% strength by volume	485.16	450.21	511.58	2.69
220830	Whiskies	308.87	282.36	298.34	-1.72
220600	Fermented beverages (cider, perry, mead etc.)	278.77	248.25	257.46	-3.90

### Japan's Top Five Beverage Product Imports and Top Supplying Countries, 2014

HS Code	Product Description	Market Share %			Canada's % Share
		1	2	3	
220421	Wine of fresh grapes, <2 litres	France 45.36	Italy 16.62	Chile 12.88	0.05
220410	Sparkling wine of fresh grapes	France 75.78	Spain 8.87	Italy 8.75	0.01
220710	Ethyl alcohol, >80% strength by volume	Brazil 70.46	Pakistan 15.30	United States 6.54	0.03
220830	Whiskies	United Kingdom 64.03	United States 32.11	Canada 2.97	2.97
220600	Fermented beverages (cider, perry, mead etc.)	South Korea 70.46	China 6.32	Vietnam 4.95	0.17



## 7. PRESERVED FOODS

Japan's Top Ten Suppliers of Preserved Foods, C\$ Millions

Country	2010	2011	2012	2013	2014	CAGR % 2010-14
<b>World</b>	<b>3,094.95</b>	<b>3,686.31</b>	<b>4,010.83</b>	<b>3,860.34</b>	<b>3,860.97</b>	<b>5.68</b>
China	1,324.05	1,602.25	1,757.43	1,659.30	1,658.21	5.79
United States	613.35	635.11	729.60	691.06	699.51	3.34
Thailand	156.72	197.69	199.03	183.26	203.66	6.77
Italy	139.49	154.08	160.51	168.48	200.29	9.46
Brazil	135.43	213.17	202.99	185.23	137.54	0.39
South Korea	109.46	116.79	114.09	90.70	85.11	-6.10
Israel	36.61	62.52	73.70	69.25	73.75	19.14
Argentina	44.20	47.79	60.72	71.79	58.30	7.16
Philippines	33.73	41.29	49.68	47.02	54.28	12.63
Chile	42.46	50.50	63.72	54.13	51.85	5.13
(15) Canada	40.44	46.08	42.49	54.47	44.33	2.32

Japan's Top Ten Suppliers of Preserved Foods, % Share

Country	2010	2011	2012	2013	2014	PP Change 2010-14
China	42.78	43.46	43.82	42.98	42.95	0.17
United States	19.82	17.23	18.19	17.90	18.12	-1.70
Thailand	5.06	5.36	4.96	4.75	5.27	0.21
Italy	4.51	4.18	4.00	4.36	5.19	0.68
Brazil	4.38	5.78	5.06	4.80	3.56	-0.82
South Korea	3.54	3.17	2.84	2.35	2.20	-1.34
Israel	1.18	1.70	1.84	1.79	1.91	0.73
Argentina	1.43	1.30	1.51	1.86	1.51	0.08
Philippines	1.09	1.12	1.24	1.22	1.41	0.32
Chile	1.37	1.37	1.59	1.40	1.34	-0.03
(15) Canada	1.31	1.25	1.06	1.41	1.15	-0.16

Preserved Foods Supply Gap, C\$ Millions

	2010	2011	2012	2013	2014	CAGR % 2010-14
Japan's imports from the world	3,094.95	3,686.31	4,010.83	3,860.34	3,860.97	5.68
Japan's imports from Canada	40.44	46.08	42.49	54.47	44.33	2.32
Supply gap	3,054.51	3,640.23	3,968.34	3,805.87	3,816.64	5.73





**Japan's Top Five Preserved Food Product Imports, C\$ Millions**

HS Code	Product Description	2012	2013	2014	CAGR % 2012-14
200410	Prepared/preserved frozen potatoes, including French fries	474.44	442.90	434.08	-4.35
200599	Prepared/preserved vegetables and vegetable mixtures	411.57	399.59	394.94	-2.04
200899	Prepared/preserved fruit and other edible plant parts	284.22	278.66	300.78	2.87
200490	Prepared/preserved frozen vegetables	288.67	281.62	299.76	1.90
200989	Juice of a single fruit or vegetable, not elsewhere specified, not fortified	182.75	208.45	215.83	8.67

**Japan's Top Five Preserved Food Product Imports and Top Supplying Countries, 2014**

HS Code	Product Description	Market Share %			Canada's % Share
		1	2	3	
200410	Prepared/preserved frozen potatoes, including French fries	United States 78.77	Canada 9.31	Belgium 5.16	9.31
200599	Prepared/preserved vegetables and vegetable mixtures	China 74.49	South Korea 15.81	Thailand 4.31	<0.01
200899	Prepared/preserved fruit and other edible plant parts	China 47.89	Thailand 13.13	Philippines 9.43	0.26
200490	Prepared/preserved frozen vegetables	China 72.89	Thailand 12.81	Vietnam 6.03	N/A
200989	Juice of a single fruit or vegetable, not elsewhere specified, not fortified	United States 46.80	New Zealand 14.34	Poland 9.51	0.48



## 8. FOOD WASTE AND ANIMAL FEED

Japan's Top Ten Suppliers of Food Waste and Animal Feed, C\$ Millions

Country	2010	2011	2012	2013	2014	CAGR % 2010-14
<b>World</b>	<b>3,100.65</b>	<b>3,043.82</b>	<b>3,217.68</b>	<b>3,196.77</b>	<b>3,457.35</b>	<b>2.76</b>
China	621.34	387.48	693.82	647.04	917.78	10.24
United States	797.90	797.07	814.47	781.70	791.40	-0.20
Thailand	298.81	313.58	353.90	354.17	409.33	8.19
Peru	210.52	135.07	172.43	102.53	133.92	-10.69
South Korea	38.93	41.06	38.43	81.32	132.22	35.75
Netherlands	86.94	51.68	58.09	86.71	125.87	9.69
France	67.26	97.75	97.25	88.51	109.19	12.88
India	382.38	620.12	387.58	350.60	104.98	-27.61
Paraguay	-	-	-	32.79	96.88	N/C*
Brazil	32.66	91.91	98.15	123.45	81.00	25.49
(17) Canada	26.65	32.06	29.06	33.80	30.94	3.80

Japan's Top Ten Suppliers of Food Waste and Animal Feed, % Share

Country	2010	2011	2012	2013	2014	PP Change 2010-14
China	20.04	12.73	21.56	20.24	26.55	6.51
United States	25.73	26.19	25.31	24.45	22.89	-2.84
Thailand	9.64	10.30	11.00	11.08	11.84	2.20
Peru	6.79	4.44	5.36	3.21	3.87	-2.92
South Korea	1.26	1.35	1.19	2.54	3.82	2.56
Netherlands	2.80	1.70	1.81	2.71	3.64	0.84
France	2.17	3.21	3.02	2.77	3.16	0.99
India	12.33	20.37	12.05	10.97	3.04	-9.29
Paraguay	0.00	0.00	0.00	1.03	2.80	2.80
Brazil	1.05	3.02	3.05	3.86	2.34	1.29
(17) Canada	0.86	1.05	0.90	1.06	0.89	0.03

Food Waste and Animal Feed Supply Gap, C\$ Millions

	2010	2011	2012	2013	2014	CAGR % 2010-14
Japan's imports from the world	3,100.65	3,043.82	3,217.68	3,196.77	3,457.35	2.76
Japan's imports from Canada	26.65	32.06	29.06	33.80	30.94	3.80
Supply gap	3,074.00	3,011.76	3,188.62	3,162.97	3,426.41	2.75



**Japan's Top Five Food Waste and Animal Feed Product Imports, C\$ Millions**

HS Code	Product Description	2012	2013	2014	CAGR % 2012-14
230400	Soybean oilcake and other solid residues, whether or not ground or pelletized	1,091.26	1,077.94	1,177.33	3.87
230910	Dog and cat food put up for retail sale	829.38	805.49	806.97	-1.36
230120	Flours/meals/pellets of fish, crustaceans, molluscs, etc. unfit for human consumption	355.30	327.73	416.22	8.23
230990	Animal feed preparations, other than dog and cat food put up for retail sale	426.65	390.79	399.39	-3.25
230330	Brewing or distilling dregs and waste, whether or not pelletized	165.67	190.35	228.86	17.53

**Japan's Top Five Food Waste and Animal Feed Product Imports and Top Supplying Countries, 2014**

HS Code	Product Description	Market Share %			Canada's % Share
		1	2	3	
230400	Soybean oilcake and other solid residues, whether or not ground or pelletized	China 52.14	United States 15.59	South Korea 9.01	N/A
230910	Dog and cat food put up for retail sale	Thailand 40.2	China 15.94	United States 13.18	0.98
230120	Flours/meals/pellets of fish, crustaceans, molluscs, etc. unfit for human consumption	Peru 32.18	Thailand 10.42	Chile 9.91	N/A
230990	Animal feed preparations, other than dog and cat food put up for retail sale	United States 29.73	France 17.47	Netherlands 9.75	3.69
230330	Brewing or distilling dregs and waste, whether or not pelletized	United States 95.98	China 2.01	Canada 1.31	1.31



## 9. EDIBLE FRUIT AND NUTS

Japan's Top Ten Suppliers of Edible Fruit and Nuts, C\$ Millions

Country	2010	2011	2012	2013	2014	CAGR % 2010-14
<b>World</b>	<b>2,792.89</b>	<b>2,950.04</b>	<b>3,207.22</b>	<b>3,061.13</b>	<b>3,306.89</b>	<b>4.31</b>
United States	857.82	879.39	1,006.43	991.09	1,077.66	5.87
Philippines	936.96	978.66	995.00	913.48	976.31	1.03
New Zealand	250.78	269.44	284.35	221.96	250.44	-0.03
Mexico	165.76	172.99	207.32	212.51	238.71	9.55
China	125.86	144.48	150.34	138.70	140.26	2.74
Chile	59.22	73.67	84.07	92.97	101.89	14.53
Australia	61.18	55.44	66.31	70.31	66.03	1.92
India	39.28	45.19	51.64	56.06	63.16	12.61
South Africa	62.53	71.40	69.36	54.91	54.67	-3.30
Canada	28.26	39.21	56.90	52.45	47.30	13.74

Japan's Top Ten Suppliers of Edible Fruit and Nuts, % Share

Country	2010	2011	2012	2013	2014	PP Change 2010-14
United States	30.71	29.81	31.38	32.38	32.59	1.88
Philippines	33.55	33.17	31.02	29.84	29.52	-4.03
New Zealand	8.98	9.13	8.87	7.25	7.57	-1.41
Mexico	5.94	5.86	6.46	6.94	7.22	1.28
China	4.51	4.90	4.69	4.53	4.24	-0.27
Chile	2.12	2.50	2.62	3.04	3.08	0.96
Australia	2.19	1.88	2.07	2.30	2.00	-0.19
India	1.41	1.53	1.61	1.83	1.91	0.50
South Africa	2.24	2.42	2.16	1.79	1.65	-0.59
Canada	1.01	1.33	1.77	1.71	1.43	0.42

Edible Fruit and Nuts Supply Gap, C\$ Millions

	2010	2011	2012	2013	2014	CAGR % 2010-14
Japan's imports from the world	2,792.89	2,950.04	3,207.22	3,061.13	3,306.89	4.31
Japan's imports from Canada	28.26	39.21	56.90	52.45	47.30	13.74
Supply gap	2,764.63	2,910.83	3,150.32	3,008.68	3,259.59	4.20



**Japan's Top Five Edible Fruit and Nut Product Imports, C\$ Millions**

HS Code	Product Description	2012	2013	2014	CAGR % 2012-14
080390	Fresh/dried bananas	888.99	838.48	897.51	0.48
080212	Fresh/dried shelled almonds	170.79	230.13	296.90	31.85
081050	Fresh kiwi fruit (Chinese gooseberries)	276.66	213.39	234.49	-7.94
080232	Fresh/dried shelled walnuts	118.03	124.47	187.64	26.09
080440	Fresh/dried avocados	161.82	166.41	186.54	7.37

**Japan's Top Five Edible Fruit and Nut Product Imports and Top Supplying Countries, 2014**

HS Code	Product Description	Market Share %			Canada's % Share
		1	2	3	
080390	Fresh/dried bananas	Philippines 91.63	Ecuador 5.23	Taiwan 0.84	N/A
080212	Fresh/dried shelled almonds	United States 98.53	Spain 0.98	Italy 0.35	N/A
081050	Fresh kiwi fruit (Chinese gooseberries)	New Zealand 98.51	Chile 1.20	United States 0.29	N/A
080232	Fresh/dried shelled walnuts	United States 94.02	Chile 3.05	China 2.46	N/A
080440	Fresh/dried avocados	Mexico 89.57	United States 6.53	New Zealand 2.73	N/A



## 10. VEGETABLES

*\*including pulses*

### Japan's Top Ten Suppliers of Vegetables, C\$ Millions

Country	2010	2011	2012	2013	2014	CAGR % 2010-14
<b>World</b>	<b>2,214.53</b>	<b>2,498.00</b>	<b>2,694.41</b>	<b>2,585.97</b>	<b>2,699.17</b>	<b>5.07</b>
China	1,272.17	1,452.35	1,520.60	1,493.20	1,574.34	5.47
United States	271.61	300.80	307.55	297.42	284.88	1.20
South Korea	81.57	89.21	114.01	113.28	115.38	9.06
Thailand	111.66	120.13	128.36	116.97	112.09	0.10
New Zealand	121.15	111.73	125.68	98.83	105.74	-3.34
Taiwan	67.70	81.88	89.13	87.22	95.85	9.08
Mexico	68.66	82.09	110.22	84.95	94.86	8.41
Canada	25.20	33.92	31.80	37.48	37.91	10.75
Ecuador	17.49	22.34	29.54	26.03	35.48	19.34
Netherlands	29.99	34.84	43.27	39.97	33.98	3.17

### Japan's Top Ten Suppliers of Vegetables, % Share

Country	2010	2011	2012	2013	2014	PP Change 2010-14
China	57.45	58.14	56.44	57.74	58.33	0.88
United States	12.26	12.04	11.41	11.50	10.55	-1.71
South Korea	3.68	3.57	4.23	4.38	4.27	0.59
Thailand	5.04	4.81	4.76	4.52	4.15	-0.89
New Zealand	5.47	4.47	4.66	3.82	3.92	-1.55
Taiwan	3.06	3.28	3.31	3.37	3.55	0.49
Mexico	3.10	3.29	4.09	3.28	3.51	0.41
Canada	1.14	1.36	1.18	1.45	1.40	0.26
Ecuador	0.79	0.89	1.10	1.01	1.31	0.52
Netherlands	1.35	1.39	1.61	1.55	1.26	-0.09

### Vegetables Supply Gap, C\$ Millions

	2010	2011	2012	2013	2014	CAGR % 2010-14
Japan's imports from the world	2,214.53	2,498.00	2,694.41	2,585.97	2,699.17	5.07
Japan's imports from Canada	25.20	33.92	31.80	37.48	37.91	10.75
Supply gap	2,189.33	2,464.08	2,662.61	2,548.49	2,661.25	5.00



**Japan's Top Five Vegetable Product Imports, C\$ Millions**

HS Code	Product Description	2012	2013	2014	CAGR % 2012-14
071080	Frozen vegetables (raw, steamed or boiled)	376.63	388.30	434.39	7.39
071290	Dried vegetables and vegetable mixtures, including whole, sliced and powdered	224.51	213.74	220.77	-0.84
070310	Fresh/chilled onions and shallots	183.04	176.98	183.02	0.00
071029	Frozen leguminous vegetables (raw, steamed or boiled)	154.08	158.26	167.09	4.14
070960	Fresh/chilled peppers	160.50	157.37	145.98	-4.63

**Japan's Top Five Vegetable Product Imports and Top Supplying Countries, 2014**

HS Code	Product Description	Market Share %			Canada's % Share
		1	2	3	
071080	Frozen vegetables (raw, steamed or boiled)	China 76.55	Ecuador 8.17	Peru 2.86	N/A
071290	Dried vegetables and vegetable mixtures, including whole, sliced and powdered	China 86.66	United States 5.84	Vietnam 2.45	N/A
070310	Fresh/chilled onions and shallots	China 79.64	United States 7.82	New Zealand 7.55	N/A
071029	Frozen leguminous vegetables (raw, steamed or boiled)	Taiwan 42.25	Thailand 27.13	China 26.32	N/A
070960	Fresh/chilled peppers	South Korea 64.52	Netherlands 19.74	New Zealand 15.55	N/A



## CONCLUSION

Japan is a mature market, and the world's fourth-largest importer of agri-food and seafood products. Canada ranked as its fourth-largest supplier in 2014, but despite showing growth, Japan's imports from Canada have been increasing at a marginally slower rate than its imports from the world. This has resulted in a significant supply gap between Japan and Canada that has been slowly but surely widening in recent years. As well, while Japan sources agri-food and seafood products from a large number of countries, among many commodities the vast majority of imports come from the top two or three suppliers, leaving just marginal market share for others.

Canada remains Japan's second-largest supplier of cereals and oilseeds, and has seen the supply value of these two commodities increase over the 2010 to 2014 period. In contrast, Canada holds less than 2% market share in six of Japan's other key import commodities (prepared meat and fish; beverages; preserved food; food waste and animal feed; edible fruit and nuts; and vegetables), and falls outside the top ten suppliers among four (fish and crustaceans; beverages; preserved food; and food waste and animal feed). However, Japanese imports from Canada have increased across all of the top ten commodities, with the exception of fish and crustaceans, and meat and edible offal. This may indicate further opportunities to lessen the gap, particularly within the categories where growth in imports from Canada outpaced growth in imports from the world, including cereals; prepared meat and fish; food waste and animal feed; edible fruit and nuts; and vegetables.

## FOR MORE INFORMATION

International Trade Commissioners can provide Canadian industry with on-the-ground expertise regarding market potential, current conditions and local business contacts, and are an excellent point of contact for export advice.

- **Overview of Trade Commissioner Services in Japan**  
<http://www.tradecommissioner.gc.ca/eng/offices-japan.jsp>
- **Find a Trade Commissioner**  
[www.tradecommissioner.gc.ca/eng/find-trade-contacts.jsp](http://www.tradecommissioner.gc.ca/eng/find-trade-contacts.jsp)

For additional intelligence on this and other markets, the complete library of Global Analysis reports can be found under *Statistics and Market Information* at the following link, arranged by sector and region of interest:

- [ats-sea.agr.gc.ca](http://ats-sea.agr.gc.ca)

## RESOURCES

Global Trade Atlas (February 2015).

## ANNEX: ABBREVIATIONS

**CAGR** - compound annual growth rate  
**N/A** - not applicable  
**N/C** - not calculable  
**PP** - percentage point (difference between two percentage values)





## **Competitive Trade Analysis: Japan**

### *Global Analysis Report*

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