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**Prepared By:** Hiroto Nakagawa & Shinsuke Kitada

**Approved By:** Alexander Blamberg

**Report Highlights:**

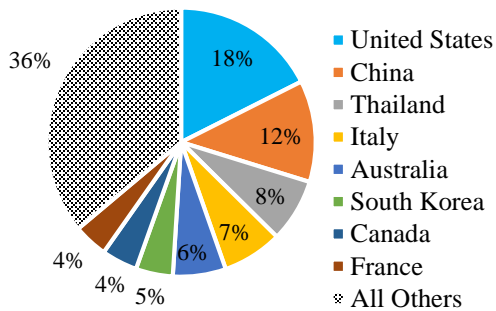
The Japanese food market was valued at \$698 billion in 2021 with retail sales accounting for \$467 billion (67 percent) and foodservice sales accounting for \$231 billion (33 percent). Japan relies on imports from other countries for the bulk of its food supply. The United States is the leading agricultural product supplier with a 23 percent market share in 2021. The Japanese market is highly competitive with consumers seeking quality, value, and convenience. This report serves as an all-in-one resource for prospective U.S. exporters to Japan with information on the food and beverage market, business culture, consumer preferences, import regulations, trends, and the U.S.-Japan Trade Agreement. Links are provided to additional resources with further details on each of these topics.

## Market Fact Sheet: Japan

### Executive Summary:

The United States is the largest foreign supplier of food and agricultural products to an import-reliant Japan (23 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 (3<sup>rd</sup>)  
**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*

## **SECTION 1: MARKET OVERVIEW**

### **Country Overview**

Japan is an island nation located off the eastern seaboard of the Eurasian continent. The Japanese archipelago consists of the five main islands of Hokkaido, Honshu, Shikoku, Kyushu, and Okinawa and over 6,800 smaller isles. The Japanese population was estimated at 125 million in December 2021. The population is concentrated in three major regions; Kanto region which includes Tokyo Metropolis and seven surrounding prefectures (population 44 million); Kinki region including seven prefectures around Osaka and Kyoto (22 million); and Chubu region including eight prefectures around Nagoya city (21 million). Japan's gross domestic product (GDP) totaled \$5.0 trillion in 2020, making it the world's third largest economy after the United States and China. Tertiary industries (the service sector) represent the mainstay of the Japanese economy, accounting for 73 percent of total GDP. Secondary industries (manufacturing) followed with 26 percent and primary industries (agriculture, fisheries, and forestry) accounted for only one percent.

Due to declining birth rates, the Japanese population is shrinking and steadily aging. Twenty-nine percent of the population is currently over the age of 65 and this number is expected to rise to 35 percent by 2040. Japan has among the world's highest average life expectancies at 88 years for women and 81 years for men in 2021. (Sources: The World Factbook, United Nations, Statistics Bureau, Ministry of Internal Affairs and Communications, Ministry of Agriculture, Forestry and Fisheries and Ministry of Economy, Trade and Industry)

### **Food Sector Overview**

The Japanese food market was valued at \$698 billion in 2021 with retail sales accounting for \$467 billion (67 percent) and foodservice sales accounting for \$231 billion (33 percent). Japan relies on imports from other countries for the bulk of its food supply. On a caloric basis, Japan's food self-sufficiency rate was 38 percent in 2021 with the remaining 62 percent derived from imported products. However, on a value basis Japan's food self-sufficiency rate is 63 percent due to comparatively high domestic food prices. The United States is the leading agricultural product supplier with 23 percent import market share in 2021.

The Japanese market is highly competitive with consumers seeking quality, value, and convenience. Consumers have several options to choose from to satisfy their food needs including restaurants, fast food, convenience stores and a variety of retailers. Major supermarket chains seek differentiation via private labels while restaurants constantly offer menus and special events to stay competitive. Although traditional menus and tastes still guide the average Japanese consumer, Western and other Asian cuisines increasingly influence the market. Domestic products are generally favored over imports, however trendy products from abroad tend to garner attention. The aging of Japan's population has focused attention on healthy and functional foods, especially those with a high protein content. Lower birth rates have led to smaller family units, increasing demand for high-quality and high-value products in smaller packages.

## Advantages and Challenges in the Japanese Market

U.S. Advantages	U.S. Challenges
Reduced duties under the U.S.-Japan Trade Agreement	Some U.S. products face higher tariffs than competitor suppliers due to preferential trade agreements such as CPTPP and the Japan-EU EPA
U.S. products have a good 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 size for the 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 weakening yen in 2022 have made U.S. products less competitive

## SECTION II. EXPORTER BUSINESS TIPS

### Market Research

U.S. exporters to Japan are encouraged to review USDA Japan reporting on commodities and sectors of interest. In addition to this report, USDA Japan annually publishes reports analyzing retail, foodservice, and processing industry. There are also ad hoc reports on home meal replacements, health foods, organic products, and hemp-derived products. All these reports and more are available at [www.USDAJapan.org/market-research](http://www.USDAJapan.org/market-research) and <https://gain.fas.usda.gov>.

### Trade Shows in Japan

Japanese buyers often prefer to find new food and beverage products at large trade shows or specially-targeted trade showcases instead of “cold calls” or requests for introductory meetings with individual companies. Many trade shows in Japan are well-suited for U.S. food and beverage companies. These include the two USDA-endorsed shows in Tokyo – FOODEX Japan and the Supermarket Trade Show – as well as the FABEX Kansai regional show in Osaka, and Food Style regional shows in Fukuoka and Okinawa. These shows allow buyers to view many products at once and provide a platform for U.S. exporters to meet with many prospective importers, retailers, wholesalers, and distributors. The ATOs in Tokyo and Osaka often organize USA pavilions or offer services to support U.S. exhibitors at these shows. More information on Japan trade shows is available at [www.usdajapan.org/find-a-partner/trade-](http://www.usdajapan.org/find-a-partner/trade-)

[shows/](#) and in the [Recommended Food and Beverage Trade Shows in Japan](#) and [ATO Osaka Trade Show Year in Review 2022](#) GAIN reports.

After two and half years of travel restrictions prohibiting most U.S. visitors from entering Japan, the Government of Japan significantly relaxed these the requirements for entry beginning in October 2022. As a result, U.S. exporters are once again able to visit Japan to meet with prospective buyers and participate in trade shows. For the most up to date information, please visit the [Embassy of Japan in Washington, D.C. website](#).

## **Business Culture in Japan**

Japanese businesspeople tend to prefer a formal approach to doing business. U.S. exporters are advised to make appointments as far in advance as possible, using e-mail rather than telephone and fax. It is important to carry business cards (*meishi*) to every engagement and present them formally with two hands. Decision making takes time in Japan so prepare for negotiations which may require several meetings to reach an agreement. Japanese buyers will likely request very detailed information on ingredients, production processes, and quality controls. Be mindful of units used in Japan and make sure to use metric terms and quotes price in CIF (cost, insurance and freight) unless your importer specifically requests FOB (Free on Board). Major holiday periods in Japan include the New Year holiday (December 30 to January 3), Golden Week (April 29 to May 5), and *Obon* (one week in mid-August). Many companies close during these periods and people take vacations.

## **Consumer Preferences**

There is a wide variety of consumer preferences in Japan. In general, Japanese consumers place high importance on food safety and quality. Many domestic producers emphasize traceability and farm-to-fork by placing photos of farmers on products packages. Japanese consumers appreciate seasonality and freshness as well as aesthetic appearance. Healthy and functional foods gained popularity during the COVID outbreak. Japanese consumers prefer products with simple ingredient lists and minimal food additives. Perhaps the most notable difference between U.S. and Japanese consumer preferences relates to product packaging. Most Japanese homes are much smaller in size than U.S. homes and have limited storage space. As a result, Japanese food packages are small and easily storable. Large, bulk packaging is impractical which is one of the reasons why Japanese consumers spend a higher proportion of their income on food than most other developed nations.

## **SECTION III. IMPORT FOOD STANDARDS & REGULATIONS / IMPORT PROCEDURES**

U.S. exporters doing business with Japan for the first time may find Japanese food standards and regulations challenging. Japanese importers and freight forwarders are often the best sources of information and provide critical assistance with import procedures. For general guidance, USDA Japan has prepared the following resources to help U.S. exporters navigate the import process.

### **Food and Agricultural Import Regulations and Standards (FAIRS) Reports**

Each year, USDA Japan publishes Food and Agricultural Imports Regulations and Standards (FAIRS) reports which describe Japan's requirements for imported food and beverage products. The FAIRS

Country Report provides information on general food laws and regulations for food additives, pesticides, packaging and containers, labeling, and other specific standards. The Japan FAIRS Export Certificate Report provides information on the required certificates for export to Japan. Additional export guidance is available at [www.usdajapan.org/export-guidance](http://www.usdajapan.org/export-guidance).

- [Japan FAIRS Country Report](#)
- [Japan FAIRS Export Certificate Report](#)

## Shipping Samples

It is possible for U.S. exporters to send sample products to Japan for buyer consideration. Interested U.S. exporters are advised to review the following two reports which provide guidance for shipping small-sized individual samples and outline eligibility requirements for duty free shipments and import notification exemptions:

- [Guidance on Shipping Individual Small-Sized Samples to Japanese Buyers – November 18, 2020](#)
- [General Instructions for Shipping Product Samples to Japan – February 9, 2020](#)

## U.S.-Japan Trade Agreement

The U.S.-Japan Trade Agreement (USJTA) entered into force on January 1, 2020. In this agreement, Japan provided substantial market access for the United States by phasing out most tariffs, enacting meaningful tariff reductions, or allowing a specific quantity of imports at a lower duty. Following implementation of USJTA, nearly 90 percent of U.S. food and agricultural products imported into Japan are duty free or receive preferential tariff access. USDA Japan has developed a series of product briefs which provide concise overviews of how USJTA affects certain product groups. The full list of product briefs as well as other information on USJTA is available at [www.usdajapan.org/usjta](http://www.usdajapan.org/usjta). Tariff treatment for agricultural products under USJTA is searchable on the [USDA Agricultural Tariff Tracker](#) and may also be found in Japan's [Customs Tariff Schedule](#).

## SECTION IV. MARKET SECTOR STRUCTURE AND TRENDS

USDA Japan publishes annual market sector reports covering retail, foodservice, and food processing. For details, please read the following:

- [Retail Foods Report](#).
- [Food Service HRI Report](#)
- [Food Processing Ingredients Report](#)

## Market Trends

### *COVID-19 Recovery and Lingering Impacts*

Although most government-imposed restrictions on eating and drinking out have disappeared, recovery from COVID-19 in the foodservice industry has been slow. Dinnertime customers are starting to return

as Japanese pubs (*izakaya*) report an uptick in year-end party reservations. However sustained labor shortage has forced many establishments to shorten operating hours and shift their focus from dinnertime to lunchtime. In addition, high import prices and shipping difficulties have hampered efforts to bring customers back with promotional offerings. Take-out (*omochikaeiri*) remains a popular choice and restaurants are expanding options, as well as creating separate lanes for take-out only. With input prices rising, both foodservice and retailers are looking for value-added messaging to justify price increases to their customers. On the positive side, Japan's relaxation of entry requirements for international visitors in October 2022 is expected to accelerate recovery in the hotel and restaurant industry. For more details, see the USDA Japan report [Visitors Return Boosting Economic Activity for Restaurant and Hotel Industry](#).

### ***Inflation and the Weak Yen***

Japan's core consumer inflation accelerated to a 40-year high in October 2022 as a weak yen pushed up the cost of imported commodities which were already rising due to global supply constraints. The nationwide core consumer price index (CPI) rose 3.6 percent year on year in October – the fastest gain since 1982. This suggests that Japanese companies are shaking off their deflationary mindset as they gradually raise prices of everything from fuel to food while coming under pressure from cost-push inflation. Food prices excluding fresh produce rose 5.9 percent and food prices as a whole rose 6.2 percent. Edible oil, pasta, and chocolate stood out with price hikes by 35.6 percent, 19.5 percent, and 10 percent, respectively. Alcoholic beverages increased 5.0 percent. Meanwhile, the value of the Japanese yen dropped significantly against the U.S. dollar in 2022, falling to a 32-year low of 151 yen/USD in October 2022. The yen has regained some ground late in the year, falling to 135 yen/USD in December, but remains far above the 2021 average of 111 yen/USD. For details, see the USDA Japan report [Food Inflation Likely to Curb Consumer Spending](#).

### ***E-Commerce***

E-commerce in Japan is an approximately \$4 trillion market, making it the fourth-largest e-commerce market in the world. Despite ongoing COVID-19 disruptions, the Business-to-Consumer (B-to-C) e-commerce marketplace grew \$180 billion in 2020. Although the overall e-commerce is large, the food and beverage sector still has room to grow, accounting for only \$20 billion in 2020. Rakuten, Amazon and Yahoo! Japan are the major players in the e-commerce marketplace. For details, see the USDA Japan [E-Commerce Market Report](#).

### **Product Trends**

After two years of COVID-19, healthy foods remain in vogue in Japan. The phrase “0.7 meal” became trendy, recommending consumers to eat only 70 percent of their normal food intake due to decreased outdoor activities. However, consumers were encouraged to fill that 70 percent with “extravagant” and “luxurious” foods to make the most of that extra time spent at home. Plant-based foods (including soy meat), frozen foods, and low alcohol beverages were some of the key products that garnered attention in the market.

### ***Plant-Based Foods***

The plant-based foods (PBF) market continues to grow in Japan. Overall PBF sales increased 62 percent in 2021 compared to 5 percent growth in the total food sector. The number of PBF product types available is estimated to have doubled in April 2022 compared to January 2019 according to the reports by Nihon Shokken, a major food manufacturer. An increasingly diversified PBF product lineup has made it easier for home cooks to incorporate them into daily meal preparation. In addition, the cost gap between PBF products and animal-based products has narrowed due to scale gains in the former and inflationary pressures on the latter. It is estimated that the unit price of plant-based hamburger meat dropped from 1.8 to 1.5 times the cost of animal-based hamburger meat between June 2021 and May 2022. Japanese consumers are sensitive to price, so this narrowing price gap is expected to support further growth in plant-based food consumption. However, the market drivers for plant-based foods in Japan are different from the United States. Rather than dietary preferences (such as vegan and vegetarian) Japanese consumers tend to focus more on environmental considerations and animal welfare as well as health and taste.

### ***Frozen Foods***

Frozen food production has grown into an approximately \$6.6 billion market today. The popularity and convenience among consumers in Japan for frozen foods has continued to increase, especially during the pandemic. According to the Japan Frozen Food Association, the domestic production value of frozen foods for household use in 2021 grew to \$3 billion, up 5.2 percent from 2020. The variety of frozen food products has broadened substantially to include frozen meat products, noodles, fried products, and rice meals. Even within these product categories there are many subcategories such as meatballs, hamburger patties, pasta noodles, Korean noodles, and Japanese noodles. New market entrants such as MUJI, Ootoya, and Picard have broadened their product lineup to include more frozen foods. MUJI, traditionally an apparel and home goods shop, now carries frozen foods in over 1,000 stores. In 2022, a unique restaurant opened in Tokyo serving exclusively frozen foods that customers heat themselves before eating. This restaurant model allows customers to try new products before buying in bulk as well as lets companies test new offerings. For details, see the USDA Japan report [Frozen Food Sector Continues to Show Promise](#).

### ***Low Alcohol Beverages***

The low alcohol beverage market is growing in Japan. According to research firm Fuji Keizai, the domestic non-alcoholic beverage market reached \$629 million in 2021, and is projected to increase to \$737 million by 2026 (up 32 percent compared to 2020). A key factor in this growth is Japan's Liquor Tax reform. By 2026, the tax on low malt beers will increase to the same level as high malt beers, driving many beer manufacturers to develop low-alcohol alternatives since beers with "less than 1 percent alcohol" will continue to be treated as "non-alcoholic" under the law and therefore liquor tax free. In particular, beer manufacturers are developing 0.5-0.7 percent alcohol beverages which are gaining popularity among consumers. For more details, see the USDA Japan report [Liquor Tax Reform](#).



## SECTION V. AGRICULTURAL & FOOD IMPORTS

Export data by aggregated groups and the top consumer-oriented products by value is shown in the tables below. For additional U.S. agricultural trade data available in customizable reports, please consult the Global Agricultural Trade System (GATS) [here](#).

### U.S. Agricultural Product Exports to Japan

Product Category	United States Exports to Japan (million USD)				
	2017	2018	2019	2020	2021
<i>Agricultural Total</i>	13,694	14,794	13,352	12,900	15,559
Consumer Oriented Products	6,577	6,797	6,436	6,368	7,025
Bulk Products	4,234	4,904	4,049	3,984	5,645
Intermediate	1,316	1,438	1,515	1,377	1,530

### Top U.S. Consumer-Oriented Product Exports to Japan

Product Category	United States Exports to Japan (million USD)				
	2017	2018	2019	2020	2021
<i>Consumer Oriented Products Total</i>	6,577	6,797	6,436	6,368	7,025
Beef & Beef Products	1,889	2,102	1,950	1,941	2,358
Pork & Pork Products	1,626	1,631	1,523	1,623	1,692
Processed Vegetables	521	509	507	475	479
Tree Nuts	398	434	416	386	438
Dairy Products	291	269	282	322	374
Fresh Fruit	316	319	323	314	300
Soup & Other Food Preparations	216	207	174	176	189
Processed Fruit	159	177	145	145	159
Non-Alcoholic Bev. (ex. juices)	132	132	126	123	124
Dog & Cat Food	96	120	130	119	119

#### *Beef and Beef Products*

In 2021, the United States exported \$2.36 billion of beef products to Japan, making Japan the second largest overseas market for U.S. beef after South Korea. Japan is a major importer of chilled and frozen meat as well as offal (mainly tongues and skirts) with foodservice sector accounting for around 60 percent of beef consumption in Japan. Although overall HRI demand has not recovered to pre-COVID-19 levels, Western-style hamburger chains and Korean-style BBQ (*yakiniku*) restaurants performed well in 2022. However, Japanese-style pubs (*izakaya*) and eateries remain sluggish as customers remain cautious about virus transmission. Retail outlets have also struggled to increase sales due to rising costs. For more on the Japanese beef market, see the USDA Japan [Livestock and Products Annual Report](#).

### ***Pork and Processed Pork Products***

Pork remains one of the most popular protein choices for Japanese households. In 2021, the United States exported \$1.7 billion of pork products to Japan, making Japan the top overseas market for U.S. pork. U.S. pork accounts for about one-third of Japan's total pork imports, competing with suppliers from Canada, Spain, Mexico and Denmark. Competition in the chilled market is especially tight between the United States and Canada. Household pork consumption, which accounts for 50 percent of total consumption, remains strong while HRI is slowly starting to recover. Inflationary pressures in the meat sector are likely to support increased pork consumption as it is considered a cheaper alternative to beef. For more on the Japanese pork market, see the USDA Japan [Livestock and Products Annual Report](#).

### ***Processed Vegetables***

In 2021, the United States exported \$479 million of processed vegetable products to Japan, making Japan the third largest overseas market after Canada and Mexico. Institutional use by hotels and restaurants has started to rebound after October 2022 and is expected to see increased demand in 2023. Meanwhile, Japanese retail consumers continue to seek convenient ready-made meals and ingredients due to the increase in single-person households and working couples, pushing demand upward for processed vegetables. The United States is the second largest supplier of processed vegetables to Japan following China. The United States is the largest supplier of prepared potatoes, sweet (canned and frozen) corn, prepared tomato, and dried onion.

### ***Tree Nuts***

In 2021, the United States exported \$438 million of tree nut products to Japan, making Japan the 6<sup>th</sup> largest overseas market for tree nuts. Export value rebounded 13 percent compared to 2020. U.S. nuts have made strong in-roads into the convenience health snack sector in Japan. Most supermarkets and convenience store chains now carry a diverse selection of nuts and dry fruit snacks. Peanuts, almonds, pecans, and walnuts in plain, roasted, and salted forms are readily available in single-serve snack packaging at convenience stores across Japan. These products primarily target the large, fast-paced, health conscience Japanese working population. USJTA provides duty-free access for U.S. almonds and walnuts as well as in-quota access for peanuts. Tariffs on almond flour will be eliminated by 2023. For more on the Japanese tree nuts market, see the USDA Japan [Tree Nuts Market in Japan Report](#).

### ***Dairy Products***

In 2021, the United States exported \$374 million of dairy products to Japan, making it the 6<sup>th</sup> largest export market. The United States is the fourth largest exporter of cheese to Japan, after Australia, New Zealand, and the European Union. Demand for imported cheese is expected to increase in 2023 to meet the growing tourism demand. Pizza consumption will drive cheese demand in the food service industry. According to the Japan Pizza Association, cheese pizza sales in 2021 were \$214 million, up 11 percent from 2020. Many consumers ordered more delivery pizza during the pandemic and this trend is likely to continue. For more on the Japanese dairy market, see the USDA Japan [Dairy Products Annual Report](#).

## **SECTION VI. KEY CONTACTS AND FURTHER INFORMATION**

Agricultural Trade Offices (in Tokyo and Osaka) and Office of Agriculture Affairs in Japan stand ready to assist you in your efforts to bring products to market in Japan.

### **ATO Tokyo**

U.S. Embassy, Japan

E-mail: [atotokyo@usda.gov](mailto:atotokyo@usda.gov)

Tel: +81 3 3224 5115

Fax: +81 3 3582 6429

### **ATO Osaka**

U.S. Consulate General Osaka-Kobe

E-mail: [atoosaka@usda.gov](mailto:atoosaka@usda.gov)

Tel: +81 6 6315 5904

Fax: +81 6 6315 5906

### **Office of Agricultural Affairs**

U.S. Embassy, Japan

E-mail: [agtokyo@usda.gov](mailto:agtokyo@usda.gov)

Tel: +81 3 3224 5102

### **U.S. Agricultural Trade Organizations (Cooperators)**

Approximately 40 U.S. agricultural trade organizations (cooperators) have representatives in Japan who promote U.S. products and help member companies enter Japanese market. The full list of cooperators is available at [www.usdajapan.org/find-a-partner/in-japan](http://www.usdajapan.org/find-a-partner/in-japan).

### **Japan External Trade Organization (JETRO)**

The Japan External Trade Organization also provides information on the Japanese market and regulations here: <https://www.jetro.go.jp/en/reports/>.

### **Attachments:**

No Attachments