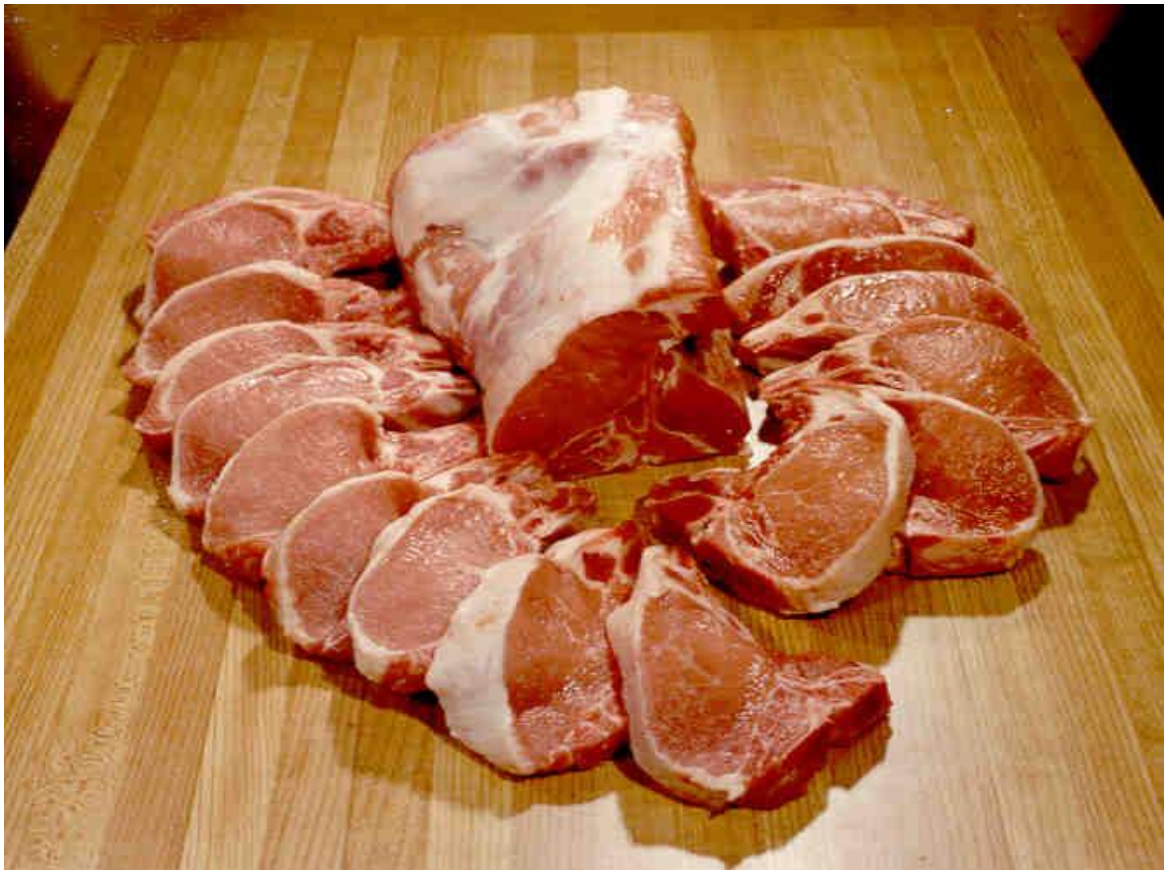
Pork Market in Japan



September 15, 2025

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PORK MARKET IN JAPAN

Executive Summary

Japan's pork market is a key segment of its agri-food sector, with pork ranking as the second most consumed meat after poultry. In 2024, per capita consumption reached 10.7 kilograms (kg), projected to rise to 11.7 kg by 2029. Retail pork sales totaled $19.5 billion, supported by affordability, health-conscious consumer trends, and demographic shifts such as aging populations and single-person households.

Domestic production remains stable but constrained by herd size and logistics challenges. Imports are essential to meet consumption demand, with Japan importing over $35 billion in pork products from 2020 to 2024. Frozen pork leads both in value and volume, reflecting a shift from fresh pork due to cost-efficiency and supply chain reliability.

Canada is Japan's second-largest pork supplier, exporting $7.7 billion in pork over five years. Manitoba leads provincial contributions, emphasizing fresh pork exports. While fresh pork remains dominant, demand for frozen and processed products is rising, driven by inflation and changing consumer preferences.

Japan's food logistics sector is rapidly evolving, integrating automation and cold chain innovations to address labor shortages and meet rising demand. Trade relations between Canada and Japan are strengthened by the Comprehensive and Progressive Agreement for Trans-Pacific Partnership (CPTPP), which has reduced tariffs and expanded market access for Canadian agri-food exports.

Overall, Japan's pork market presents stable demand and growth opportunities. Canadian exporters are well-positioned to benefit by adapting to evolving product preferences and leveraging trade agreements to maintain competitiveness.

Key Demographics and Economic Indicators

Country name: Japan
Head of State: Emperor Naruhito
Government Type: Unitary parliamentary constitutional monarchy
Capital: Tokyo
Legislature: Parliament (Upper and Lower House)
Judiciary: Supreme Court and three levels of lower courts
Location: Japan is a country located in the northwest Pacific Ocean and bordered on the west by the Sea of Japan, extending from the Sea of Okhotsk in the north toward the East China Sea, Philippine Sea, and Taiwan in the south. Japan is a part of the Ring of Fire, and spans an archipelago of 14,125 islands, with the four main islands being Hokkaido, Honshu (the "mainland"), Shikoku, and Kyushu. Tokyo is the country's capital and largest city, followed by Yokohama, Osaka, Nagoya, Sapporo, Fukuoka, Kobe, and Kyoto.
Economic indicators: Japan has the world's 5th largest economy ($6.58 trillion).
Population: 126 million people (Census 2020)
GDP growth: 1.7 per cent (2023)[1]
GDP per capita: $53,000 (2024 estimate)
GDP per capita rank: 34th (nominal, 2024 estimated)
Inflation: 2.7 per cent in 2024 (Statistics Bureau of Japan)

[1] Worldbank.org

Consumption and the Market

Consumer Trends

Pork plays a central role in the Japanese diet, ranking as the second most consumed meat after poultry (Table 1). In 2024, per capita pork consumption in Japan was approximately 10.7 kg per year, with projections indicating an increase to 11.7 kg per year by 2029.[2] This consumption is divided into two main channels: retail purchases and consumption at hotels, restaurants and institutions (HRI).

According to statistics from Japan's Ministry of Internal Affairs and Communications (MIAC), retail sales of pork (excluding preserved products such as sausages and bacon) were 7.6 kg per person in both 2023 and 2024. In 2024, consumers paid two per cent more for pork, opting for less expensive cuts while maintaining overall purchase volume.

In the HRI[3] segment, sales at Chinese restaurants in Japan, which offer a wide variety of pork dishes for both dine-in and take out, increased by 11 per cent year-over-year in 2024. Additionally, consumer traffic grew by six per cent, surpassing the segment's average growth rate of four per cent.

Table 1. Total Sales of Meat by Category in '000 tonnes

Category	2019	2020	2021	2022	2023	2024
Total	**4,153**	**4,076**	**4,091**	**4,135**	**4,169**	**4,197**
Beef and Veal	892	825	777	831	829	817
Lamb, Mutton and Goat	17	15	15	16	17	17
Pork	1,327	1,313	1,331	1,333	1,331	1,325
Poultry	1,911	1,918	1,963	1,949	1,987	2,033
Other Meat	6	6	5	6	6	6

Source: Euromonitor July 2025

Retail Market Size and Forecast

In 2024, Japan's retail pork market was valued at $19.5 billion, with total sales reaching 1.3 million tonnes. By 2029, the market is projected to grow by 0.7 per cent in volume and 0.8 per cent in retail value (See Table 2).

Retail pork sales in Japan are expected to remain relatively steady in 2025, with modest growth driven by rising health and wellness trends[4]. As high-protein diets become more popular, particularly in the retail segment, pork continues to be seen as a valuable source of protein, helping sustain consumer demand. However, rising meat prices in recent years have discouraged consumer purchases, largely due to a weaker yen and higher feed and transportation costs. In 2024, beef and veal saw the steepest price increases, as they are primarily imported. At the same time, many Japanese households are facing reduced disposable incomes, making these meats less affordable. As a result, consumers are increasingly turning to pork, which is more budget-friendly, leading to a modest increase in pork sales.

Sales of pork and pork products are also benefiting from changes in work and lifestyle patterns, shaping food choices. With more people working from home and having less time to exercise, weight management has become a priority, supporting the demand for protein-rich foods. Demographic shifts, including a rise in single-person households and an aging population, are also boosting pork consumption. Pork is often seen as easier to cook than fish, making it a convenient option for busy consumers.

[2] Euromonitor - Meat in Japan (December 2024)
[3] Hotel, restaurants and institutions
[4] The number of people in Japan trying to eat more protein jumped from 16 per cent in 2019 to 25 per cent in 2023. –Euromonitor – Meat in Japan (December 2024)

Table 2. Market Size and Forecasted Volume Compound Annual Growth Rate (CAGR) for the Japanese Pork Market

Type of Meat	*2024 Market Size by Retail Value RSP[5] (CAD million†)*	*2024 Market Size by Total Volume (000 tonnes)*	*Forecasted Volume Growth 2024-2029 CAGR (%)*	*Forecasted Retail Value Growth 2024-2029 CAGR (%)*
Pork	$19,548.00	1,325	0.7	0.8

Source: Euromonitor - July 2025

Japan's Pork Production and Trade Balance

According to the United States Department of Agriculture (USDA) office in Japan, Japanese swine stocks are expected to decline in 2025 compared to 2024. This is due to stable demand for domestically produced pork, which encouraged farmers to increase slaughter rates, and a smaller sow population resulting in fewer piglets born in 2024.[6] While farmers plan to maintain their current herd size, they are focusing on improving herd quality. As a result, the pace of slaughter is expected to remain steady in 2025.

Japan's pork production in 2024 remained roughly the same as in 2023, as carcass weights offset the decline in slaughter numbers. Carcass prices stayed consistently high throughout 2024, compared to the previous three years. There were no significant disease outbreaks reported during the year.

Table 3. Pork Production in Japan

Year	Slaughter (head)	Production (CWE, MT)	Ave. carcass weight (kg)
2023	16,407,211	1,293,437	79
2024	16,265,364	1,287,704	79
% Change	**-1%**	**0%**	**0%**

Source: Foreign Agricultural Service - USDA – May 2025

Japan's Pork and Pork Product Imports

Between 2020 and 2024, Japan imported approximately $35.25 billion worth of pork products, with a CAGR of -0.76 per cent. The largest import category was frozen pork, accounting for 44.18 per cent of total imports, followed by fresh pork at 35.53 per cent.

Despite a slight overall decline in pork imports, frozen pork showed a positive CAGR of 2.08 per cent, indicating growing demand for this category. In contrast, fresh pork imports declined, with a CAGR of -3.94 per cent, suggesting a shift in consumption patterns or supply chain dynamics, as shown in Table 4.

Prepared and preserved pork products, including shoulders and offal, made up a smaller portion of imports. Notably, edible offal of swine (frozen) experienced a significant CAGR of 7.98 per cent, while pig fat imports declined sharply, with a CAGR of -9.54 per cent.

The highest growth was observed in fresh or chilled edible offal, with a CAGR of 52.8 per cent, albeit from a small base. This indicates a niche, but rapidly growing, segment. Bellies and livers also showed strong growth, with CAGR values of 34.27 per cent and 22.36 per cent respectively.

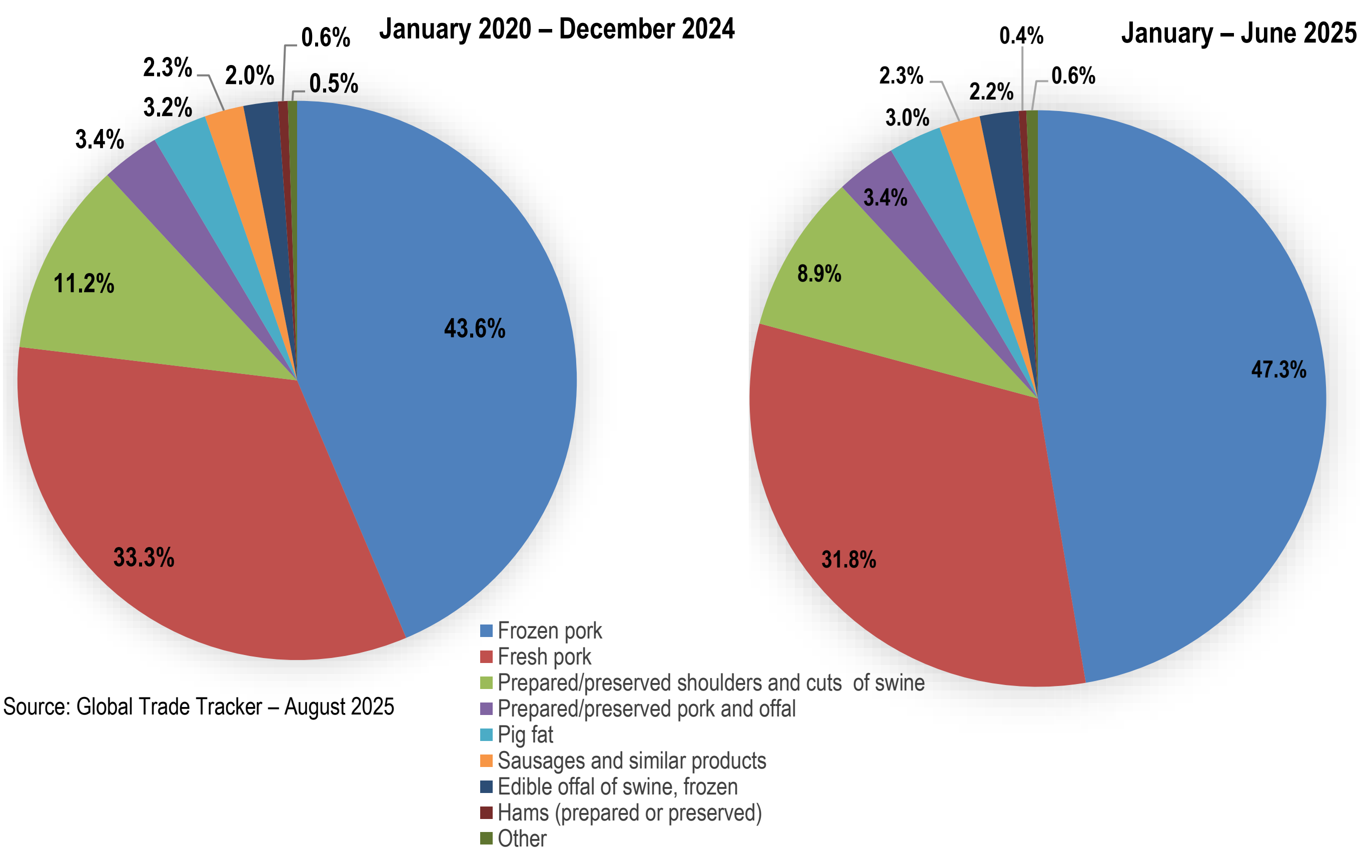
[5] Retail Sale Price RSP is the maximum price at which the excisable goods in packaged form may be sold to the ultimate consumer and includes all taxes, local or otherwise, freight, transport charges, commission payable to dealers, and all charges towards advertisement.
[6] Foreign Agricultural Service (FAS) office of the U.S. Department of Agriculture (USDA) located in Tokyo, Japan

Table 4. Japan's Imports of Pork Products from 2020 to 2024 in Canadian Dollars

Description	Total ($) 2020-2024	%	2020 $	2021 $	2022 $	2023 $	2024 $	CAGR %
Total	**35,250,443,439**	**100.00**	**7,424,371,680**	**6,896,466,695**	**6,908,240,644**	**6,820,312,544**	**7,201,051,876**	**-0.76**
Frozen pork	15,573,342,859	44.18	3,186,516,293	2,922,945,697	3,073,398,085	2,930,059,924	3,460,422,860	2.08
Fresh pork	12,525,389,411	35.53	2,776,428,174	2,627,325,755	2,396,900,313	2,361,151,302	2,363,583,867	-3.94
Prepared/preserved cuts	3,156,061,598	8.95	633,161,052	592,993,888	645,408,064	678,712,762	605,785,832	-1.10
Prepared/preserved pork & offal	1,403,382,159	3.98	271,672,270	298,758,651	291,376,822	267,459,784	274,114,632	0.22
Sausages and similar products	947,180,760	2.69	215,211,929	186,737,632	186,017,927	178,196,582	181,016,690	-4.23
Edible offal of swine, frozen	525,975,648	1.49	79,049,300	92,408,104	120,805,748	126,258,380	107,454,116	7.98
Pig fat	531,955,385	1.51	128,064,186	60,704,752	96,556,099	160,891,616	85,738,732	-9.54
Pork, salted, brine, dried, smoked	235,084,832	0.67	44,706,105	46,656,440	41,486,409	48,937,974	53,297,904	4.49
Hams (prepared or preserved)	204,657,463	0.58	58,712,661	36,555,298	26,889,173	38,594,755	43,905,576	-7.01
Frozen hams, with bone in	59,366,806	0.17	8,920,406	9,633,729	12,795,354	16,292,429	11,724,888	7.07
Hams, salted, in brine, dried /smoked, w/ bone in	21,851,467	0.06	4,428,494	3,680,259	4,602,470	4,709,685	4,430,559	0.01
Fresh/chilled hams, with bone in	33,353,436	0.09	7,969,682	8,560,101	7,114,924	5,292,312	4,416,417	-13.72
Bellies "streaky," salted, in brine, dried or smoked	23,061,548	0.07	8,773,734	8,505,663	2,900,290	1,244,604	1,637,257	34.27
Frozen edible livers of swine	3,032,192	0.01	441,916	550,154	429,466	620,123	990,533	22.36
Fresh or chilled edible offal	2,492,889	0.01	173,047	288,836	441,947	645,733	943,326	52.80
Frozen carcases and half-carcases	839,548	0.00	142,431	157,894	228,388	132,043	178,792	5.85

Source: Global Trade Tracker, August 2025

Graph 1. Percentage Distribution of Japanese Imports in Volume of Pork Products



Source: Global Trade Tracker – August 2025

In terms of volume, Japan imported over six million tonnes of pork products between 2020 to 2024. Frozen pork led in volume as well, comprising 43.62 per cent of total imports, followed by fresh pork at 33.3 per cent. These volume trends mirrored the value trends, with frozen pork increasing and fresh pork slightly declining. Prepared and preserved shoulders and cuts accounted for 11.21 per cent of the volume, reinforcing their importance in the Japanese market.

As shown in Graph 1, frozen pork accounted for 47.3 per cent of total import volumes in the first half of 2025, continuing its upward trend. In contrast, fresh pork imports declined to 31.8 per cent, further reinforcing the shift from fresh to frozen pork, as also illustrated in Table 5. The total import volume for the first half of 2025 is 0.6 million tonnes, exactly half of the recorded amount for 2024.

Table 5. Japan's Imports of Pork Products from 2020 to 2024 in Tonnes

Description	Total (tonnes) 2020 - 2024	%	2020 tonnes	2021 tonnes	2022 tonnes	2023 tonnes	2024 tonnes
Total	6,052,025	100	1,181,768	1,168,247	1,265,646	1,205,402	1,230,962
Frozen pork	2,639,677	43.62	474,114	481,484	571,118	523,445	589,517
Fresh pork	2,013,976	33.3	415,195	419,120	402,706	392,676	384,279
Prepared/preserved shoulders and cuts of swine	678,544	11.21	144,281	135,834	146,027	134,174	118,227
Prepared/preserved pork and offal	203,825	3.37	37,656	44,647	42,068	38,792	40,662
Pig fat	191,418	3.16	43,514	26,335	38,111	50,759	32,699
Sausages and similar products	136,622	2.26	29,505	26,795	28,444	25,580	26,298
Edible offal of swine, frozen	120,301	1.99	21,007	21,402	25,849	26,537	25,506
Hams (prepared or preserved)	34,086	0.56	10,383	6,144	4,603	6,198	6,758
Pork, salted, in brine, dried or smoked	11,999	0.2	2,233	2,265	2,355	2,534	2,613
Frozen hams, shoulders and cuts thereof of swine, with bone in	10,099	0.17	1,369	1,603	2,266	2,837	2,024
Fresh/chilled hams with bone in	4,807	0.08	1,138	1,241	1,053	747	629
Frozen edible livers of swine	1,647	0.03	285	274	232	282	573
Hams, salted, in brine, dried or smoked, with bone in	1,244	0.02	272	234	301	229	208
Fresh or chilled edible offal of swine	433	0.01	32	61	85	108	147
Bellies "streaky" and cuts, salted, in brine, dried or smoked	1,992	0.03	775	793	241	77	106
Frozen carcases and half-carcases of swine	57	0	9	11	17	8	13

Source: Global Trade Tracker, August 2025

As shown in Table 6, the United States (U.S.) was Japan's largest pork supplier between 2020 and 2024, contributing over $10.8 billion in pork and pork products. However, U.S. exports to Japan declined over the period, with a CAGR of -4.38 per cent. Canada followed, supplying $7.7 billion worth of pork, with a CAGR of -1.31 per cent. Spain emerged as a strong performer with a CAGR of 9.42 per cent, reflecting increased market penetration. Brazil showed the most dramatic growth, with a CAGR of 46.02 per cent, indicating a strategic expansion into the Japanese market. Chile and France also posted double-digit growth rates, at 13.61 per cent and 10.26 per cent, respectively.

In the first half of 2025, Japan imported $3.8 billion in pork products, representing 52.3 per cent of the total import value for 2024. Brazil significantly increased its market share, accounting for 8.6 per cent of total imports, compared to its 2020-2024 average of 2.8 per cent. Canada's market share rose slightly, from 21.8 per cent (as shown in Table 6) to 22.0 per cent in the first half of 2025. Spain's share increased to 18.2 per cent, up from a five-year average of 13.2 per cent.

Table 6. Japan's Imports of Pork Products by Country in Canadian Dollars

Country	Total ($) 2020-2024	%	2020 $	2021 $	2022 $	2023 $	2024 $	CAGR %
World	**35,250,443,446**	**100.00**	**7,424,371,682**	**6,896,466,696**	**6,908,240,646**	**6,820,312,547**	**7,201,051,875**	**-0.76**
United States	10,777,804,613	30.57	2,406,395,137	2,243,209,854	2,073,428,910	2,042,988,956	2,011,781,756	-4.38
Canada	7,671,393,755	21.76	1,692,511,071	1,529,806,768	1,375,149,761	1,468,528,046	1,605,398,109	-1.31
Spain	4,667,626,436	13.24	746,588,201	772,871,152	1,053,481,026	1,024,611,052	1,070,075,005	9.42
Mexico	3,848,609,059	10.92	743,729,288	729,661,119	787,571,387	805,611,078	782,036,187	1.26
Denmark	2,573,826,599	7.30	556,829,891	556,875,160	560,950,568	444,745,458	454,425,522	-4.95
Brazil	992,499,025	2.82	96,939,110	89,360,230	157,619,807	207,930,381	440,649,497	46.02
Chile	1,110,584,372	3.15	181,453,625	190,795,729	191,796,070	244,255,764	302,283,184	13.61
France	549,259,539	1.56	93,243,033	92,773,799	107,555,347	117,899,624	137,787,736	10.26
Netherlands	1,001,252,699	2.84	251,734,230	239,493,782	227,723,532	175,115,940	107,185,215	-19.22
China	518,944,828	1.47	120,455,863	104,749,905	104,884,630	96,388,964	92,465,466	-6.40

Source: Global Trade Tracker, August 2025

In terms of tonnage, the U.S. and Canada remained the top suppliers, providing 1.88 million and 1.34 million tonnes, respectively. Spain and Mexico followed, with Spain showing a notable growth in both value and volume. Brazil's tonnage also grew significantly, aligning with its value growth and suggesting a competitive pricing strategy that boosted demand. Overall, Japan's pork import landscape from 2020 to 2024 reflects shifting consumer preferences, supply chain adaptations, and evolving trade relationships. While traditional suppliers like the U.S. and Canada remain dominant, emerging players such as Brazil and Spain are gaining ground, as confirmed by early 2025 data. The data also highlights diversification in product types, with increased interest in offal and preserved pork products. These trends are crucial for stakeholders seeking to understand market dynamics and forecast future developments in Japan's pork import sector.

Although demand for imported pork remains stable, Japan's domestic distribution system faces challenges. Cold storage space is limited, and there is a shortage of truck drivers, which affects logistics efficiency. To mitigate risks, such as import disruptions and price volatility caused by animal disease outbreaks, Japanese importers are diversifying their trading partners geographically. For example, imports of Brazilian pork spiked by 124 per cent year-over-year in 2024, replacing more expensive frozen pork from European suppliers.

In 2024, imports of frozen pork increased by 12 per cent in 2024 year-over-year, while imports of chilled pork and prepared/preserved pork products declined. Frozen pork is mainly consumed by food service companies and food manufacturers, whereas chilled pork is sold at retail. Under ongoing high inflation conditions, retailers have increasingly shifted to imported frozen pork as a more cost-effective alternative to chilled pork.

Table 7. Japan's Imports of Pork Products by Country in Tonnes

Country	Total (tonnes) 2020 - 2024	%	2020 tonnes	2021 tonnes	2022 tonnes	2023 tonnes	2024 tonnes
World	**6,052,025**	**100.00**	**1,181,768**	**1,168,247**	**1,265,646**	**1,205,402**	**1,230,962**
United States	1,880,628	31.07	412,011	394,880	370,461	356,157	347,118
Canada	1,341,415	22.16	272,967	260,803	253,535	265,033	289,077
Spain	791,075	13.07	110,612	125,329	195,281	183,127	176,726
Mexico	650,037	10.74	118,027	124,414	143,028	138,803	125,764
Brazil	187,969	3.11	16,247	16,219	30,667	40,220	84,616
Denmark	432,753	7.15	81,481	92,446	107,687	78,974	72,164
Chile	204,298	3.38	29,580	34,667	40,316	46,473	53,261
France	87,600	1.45	13,262	14,854	18,302	19,942	21,241
Netherlands	177,056	2.93	39,829	42,355	46,133	31,981	16,760
China	80,519	1.33	17,163	16,092	16,325	15,425	15,514

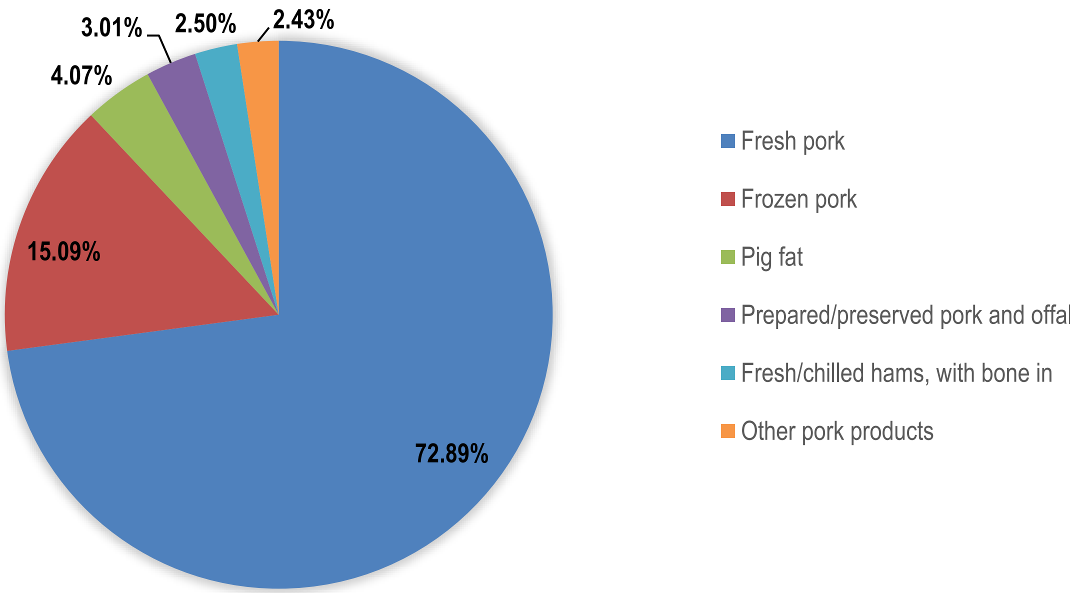
Source: Global Trade Tracker, August 2025

Canada’s Pork Exports to Japan

Between 2020 and 2024, Canada exported approximately $7.7 billion work of pork products to Japan, with a total export volume of 1.3 million tonnes. The CAGR for export value was -1.3 per cent, indicating a relatively stable trade relationship with some year-to-year fluctuations. Fresh pork dominated Canada's pork exports to Japan, accounting for nearly 73 per cent of total export value. Despite a slight decline in CAGR of -0.48 per cent, fresh pork remained the most significant category, with export values peaking in 2020 and 2024.

In the first half of 2025, Canadian pork exports to Japan reached $828 million, showing a slight increase compared to the same period in 2024. Frozen pork followed, representing 15.09 per cent of total export value and with a strong CAGR of 9.40 per cent, suggested growing demand. Pig fat and prepared/preserved pork and offal contributed 4.07 per cent and 3.01 per cent, respectively, with the latter showing a notable CAGR of 22.64 per cent, which indicates increasing interest in processed pork products. Other categories such as fresh/chilled hams, edible offal, and sausages had smaller shares but showed varied trends. Fresh/chilled hams experienced a significant decline with a CAGR of -24.50 per cent, while frozen hams and preserved hams showed a remarkable CAGR of 664.76 per cent. This suggests a shift in consumer preferences towards processed pork products in Japan.

Graph 2. Percentage Distribution of Canadian Exports of Pork Products in Value for the Period 2020 to 2024



Source: Global Trade Tracker, August 2025

In terms of volume, fresh pork led with 781,000 tonnes, followed by frozen pork at 200,000 tonnes over the last five years. Pig fat exports totaled 96,000 tonnes, and prepared/preserved pork and offal reached 41,000 tonnes. These figures highlight the diversity of Canada’s pork exports and their responsiveness to evolving markets in Japan.

Provincial Contributions and Trends

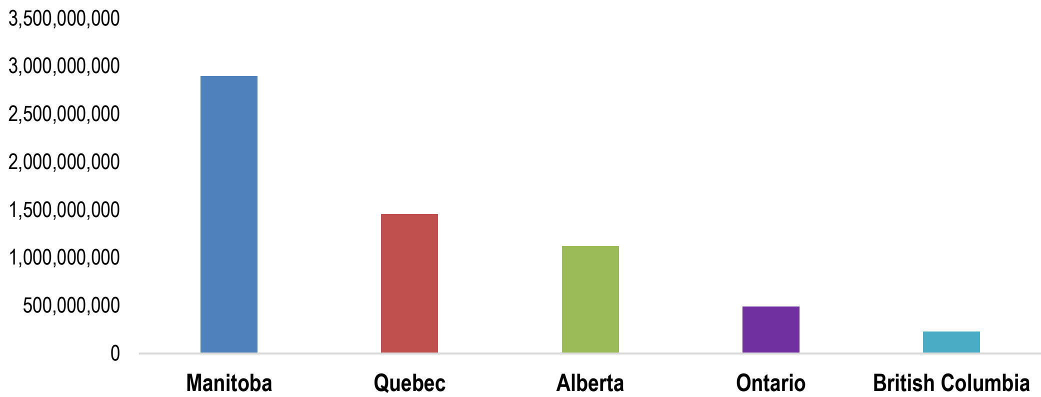
During the 2020-2024 period, Manitoba was the leading provincial exporter, contributing 46.8 per cent of Canada’s total pork export value to Japan, followed by Quebec (23.5 per cent) and Alberta (18.1 per cent). Manitoba also led in volume, exporting 558,000 tonnes. Among major contributing provinces, Alberta showed the highest growth rate, with a CAGR of 6.2 per cent, while Quebec and Ontario experienced slight declines. British Columbia, though smaller in share, posted a healthy CAGR of 4.6 per cent.

Overall, Canada's pork export landscape to Japan from 2020 to 2024 reflects a stable, yet evolving, trade relationship. While fresh pork remains the cornerstone, there is a clear upward trend in frozen and processed pork exports. From 2020 to 2024, fresh pork and frozen pork represented 65.4 and 16.8 per cent, of Canada’s total export volume. For Manitoba, these figures were 78.3 and 16.2 per cent, respectively, underscoring the province’s stronger emphasis on fresh pork exports.

In Manitoba, fresh pork export volumes remained stable, ranging from 94,000 tonnes in 2020 to 92,000 tonnes in 2024. Frozen pork exports increased, rising from 16,600 tonnes in 2020 to a peak of 22,400 tonnes in 2024.

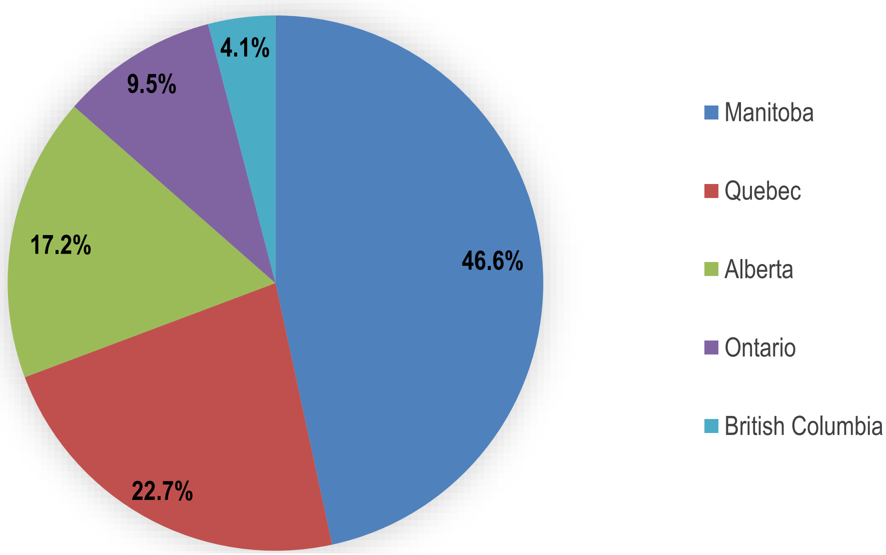
These export trends highlight the importance of regional production capacity and market adaptability. Manitoba has demonstrated consistent performance in pork exports to Japan, particularly in fresh pork, which reflects its ability to meet the demand for higher-value products.

Graph 3. Canada's Exports of Pork Products to Japan by Province in Canadian Dollars for the Five-year Period 2020-2024



Source: Global Trade Tracker, August 2025

Graph 4. Canada's Pork Products Exports to Japan by Province in Tonnes (percentage) for the Five-year Period 2020-2024



Source: Global Trade Tracker, August 2025

Supply Chain Dynamics

Japan's food logistics market[7] was valued at $9.9 billion in 2024 and is projected to reach $17.4 billion by 2033, growing at an average annual rate of 6.36 per cent. This growth is driven by rising demand for packaged and ready-to-eat foods, the expansion of online shopping, and technological advancements in cold chain logistics. Innovations, such as real-time tracking and automated temperature control, are improving the safety and quality of perishable food transport, helping companies meet Japan's strict standards. At the same time, the country's aging population is contributing to labor shortages in logistics and transportation, prompting businesses to adopt automation, robotics, and AI (artificial intelligence) to maintain efficiency.

To support expansion, companies are forming strategic partnerships and pursuing acquisitions, although integrating new systems and teams remains a challenge. The market is segmented by transport mode (road, rail, sea, and air), product type (seafood, meat, fruits and

[7] Food logistics market refers to the commercial ecosystem that enables the efficient, safe, and timely transportation, storage, and distribution of food products.

vegetables, dairy, beverages), service type (cold chain and non-cold chain), and operations (transportation, packaging, and instrumentation). Despite strong growth potential, the industry faces challenges such as high costs for advanced cold chain systems, rising consumer expectations, and the need for constant innovation. Balancing technology adoption, workforce limitations, and evolving market demands will be essential for long-term resilience and efficiency.

Japan's food distribution channels combine traditional and modern logistics systems, structured by transportation mode, product type, service type, and regional coverage. Transportation methods, including roadways, railways, seaways, and airways, are selected based on product perishability and delivery timelines. Products are categorized into fish, shellfish, meat, vegetables, fruits, nuts, cereals, bakery, dairy products, coffee, tea, vegetable oil, and others, each influencing the choice of logistics strategies. Cold chain logistics are critical for maintaining the quality and safety of perishable goods like seafood, dairy, fresh produce, and fresh meats, using temperature-controlled systems enhanced by sensors and real-time monitoring. Non-cold chain services support less temperature-sensitive products.

Operational segments include transportation, packaging, and instrumentation, all of which contribute to product integrity and delivery efficiency. Regionally, food distribution spans Japan's major areas including Kanto, Kansai/Kinki, Chubu, Kyushu-Okinawa, Tohoku, Chugoku, Hokkaido, and Shikoku with tailored logistics strategies to meet local demand and infrastructure capabilities. Overall, Japan's food logistics and distribution systems are evolving rapidly, integrating smart technologies and automation to address labor shortages and meet growing consumer expectations for speed, freshness, and reliability.

Canada–Japan Trade Relations

Japan is the world's fourth-largest economy and ranked as the third-largest destination for Manitoba's agri-food exports in 2024. Bilateral trade between Canada and Japan has grown steadily, supported by the Comprehensive and Progressive Agreement for Trans-Pacific Partnership (CPTPP), which has significantly reduced or eliminated tariffs on many Canadian exports, especially in agriculture and agri-food.

In 2024, Canada exported $15 billion in merchandise to Japan, while imports totaled $21.4 billion. Leading Canadian agri-food exports included canola seed, wheat, pork, beef, and soybeans. Key imports from Japan were vehicles, machinery and equipment, and scientific and precision instruments.

The CPTPP grants preferential access for Canadian agri-food producers to strategic markets like Japan. Tariffs are being phased out or reduced on a wide range of products, including meat, grains, pulses, maple syrup, wine and spirits, seafood, and other agri-food goods. Since the CPTPP's implementation on Dec. 30, 2018, Japan has eliminated tariffs on approximately 32 per cent of its agricultural and agri-food tariff lines. An additional nine per cent offer preferential access through permanent, country-specific quotas for Canada. The remaining tariff lines are subject to gradual reductions or eliminations over a period of up to 20 years, including adjustments to in-quota and out-of-quota rates.

Market Access Regulations

Before entering the Japanese market, exporters must first verify whether their products are authorized for sale. Import restrictions related to phytosanitary standards or food safety regulations may prevent certain products from being accepted. Compliance with Japan's regulations on food ingredients, particularly food additives, is essential.

Exporters are strongly encouraged to work closely with local import agents, distributors, and end users to ensure full regulatory compliance and proper documentation. For detailed guidance, the following resources are available:

- Exporting food out of Canada (Canadian Food Inspection Agency)
- Step-by-Step Guide to Exporting (Trade Commissioner Service of Canada)

Exporters should also determine the correct import classification and applicable tariff rates for their products. The Tariff Finder tool [8] can help identify tariff information for specific products in countries where Canada has a free trade agreement. Japan Customs also offers an advance ruling service for tariff classifications, available to importers and related parties.

[8] Canada Tariff Finder - BDC (Business Development Bank of Canada)

Key Contact

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References

www.tradecommissioner.gc.ca

www.wikipedia.org

www.worldbank.org

www.statista.com

www.agr.gc.ca

www.canada.ca

www.usda.gov

Others:

Catsnet

Euromonitor

Global Trade Tracker

Contact us

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Available in alternate formats upon request.