

Vegetable & Fruits

December 27, 2011

TRENDS OF IMPORTED VEGETABLES AND FRESH FRUITS

The Great East Japan Earthquake on March 11, 2011 that caused great disaster and accident of the Fukushima nuclear power plant increased the volume of imported vegetables largely, but it is starting to go back to normal. The data of imported vegetables by volume and value for the past 3 years is as shown below. In 2010, the overall import volume of vegetables sharply increased 313,426 tons to 2,498,324 tons (year to year 114.3%). On a category basis, fresh vegetables increased 205,323 tons to 820,594 tons (year to year 133.4%), and frozen vegetables largely increased 68,375 tons to 852,547 tons (year to year 108.7%).

(1) Category-based import volume			
	(Unit ton)		
	2008	2009	2010
Fresh	602,733	615,271	820,594
Frozen	797,208	784,172	852,547
Salting	132,843	111,266	111,222
Dried	48,679	45,352	46,017
Vinaigrette	29,909	30,240	33,749
Tomato processed	216,974	198,810	209,553
Other processed	416,435	382,095	404,241
Others	18,615	17,692	20,403
Total	2,263,396	2,184,898	2,498,324
(2) Category-based import value			
	(Unit million yen)		
	2008	2009	2010
Fresh	72,201	65,896	85,321
Frozen	116,142	108,472	115,444
Salting	11,927	9,309	9,748
Dried	26,379	23,317	27,378
Vinaigrette	4,945	4,841	5,684
Tomato processed	25,335	24,528	21,667
Other processed	80,963	68,663	72,174
Others	1,202	1,250	1,567
Total	339,095	306,276	338,983

Source: Prepared by Agriculture & Livestock Industries Corporation based on Trade Statistics by Ministry of Finance

Some of the items that made a large growth in fresh vegetables are as follows. Onions increased 131,902 tons to 339,477 tons (year to year 163.5%), carrots & radishes increased 23,369 tons to 65,187 tons (year to year 155.9%), green onions increased 17,625 tons to 50,188 tons (year to year 154.1%), cabbages increased 10,313 tons to 23,368 tons (year to year 179.0%), and broccoli increased 6,143 tons to 35,683 tons (year to year 120.8%). Looking at the percentage of increase volume by item in the fresh vegetables, onions are 64.2%, carrots & radishes are 11.4%, green onions are 8.6%, cabbages are 5.0%, and broccolis are 3.0%. There had been a poor crop of onions due to the bad weather, and this increased the import volume, causing the volume of fresh vegetable

imports to rise sharply as a whole.

As for frozen vegetables, potatoes increased 27,436 tons to 347,445 tons (year to year 108.6%), green soy beans increased 7,889 tons to 66,818 tons (year to year 113.4%), spinach increased 5,004 tons to 27,088 tons (year to year 122.7%), Kidney beans increased 4,393 tons to 24,491 (year to year 121.9%), broccoli increased 3,461 tons to 26,577 tons (year to year 115.0%), and other frozen vegetables increased 19,938 tons to 199,556 tons (year to year 111.1%). Similarly, the contribution ratio of each items are as follows. Potato 40.1%, other frozen vegetables 29.2%, green soybeans 11.5%, spinaches 7.3%, kidney beans 6.4%, and broccolis 5.1%. There had been a poor crop of potatoes due to the bad weather, and this increased the import volume, causing the volume of frozen vegetable imports to rise.

Looking at importing country for fresh vegetables, onions, green onions and cabbage from China, and carrots, radishes, and broccoli from the US increased respectively. For frozen vegetables, potatoes from the US, green soybeans from Taiwan, Thailand, China, spinaches from China, Kidney beans from China, Thailand, and broccoli from China and Ecuador increased.

The vegetable imports in 2010 increased greatly due to the poor harvest caused by bad weather in Japan, but the strong yen creating large gaps between domestic and import prices was another major reason. As a result, the volume of imported goods from China rose to 51.4% and the percentage of products from China within the total import value increased to 49.6%.

Trend of imported fresh fruits

The consumption volume of fruits (including processed fruits) within Japan has recently been leveling off, although there are fluctuations in the production volume of tangerines and apples, which are the major fruits. According to a research data, the annual consumption volume for fresh fruits by an average Japanese person is 43.1kg in 2005. Compared to 2000, there is a 3.9% rise, but since it takes time to peel and remove the seeds while eating fresh vegetables, the younger generations are starting to move away from fruits with their stronger tendency of easier cooking and eating. On the other hand, the middle-aged group with higher concerns for their health, they are eating more fruits, which is said to be healthy, more consciously and aggressively.

According to the balance sheet of FAO (Food and Agriculture Organization of the United Nations), fruits consumption of Japanese people are much larger than China or

Russia, but is quite low when compared with the US and Europe, consuming only 1/2 of their volume. The US and the European countries eat fruits on a daily basis, and it is a normal part of their eating cycle. On the other hand, fruits are seen as a personal preference item for the Japanese, and the consumption stays low, but this also means that it has the possibility of growth depending on the way of marketing.

Fresh fruits mainly point to the representative types of fruits such as tropical fruits, temperate fruits, and citrus. This does not include frozen, dry, canned, or processed fruits. It is categorized in more details as listed below.

Tropical Fruits: banana, pineapple, avocado, mango, guava, mangosteen, papaya, durian, rambutan, passion fruits, lychee

Temperate Fruits: grape, watermelon, melon, apple, cherry, kiwi

Citrus: orange, grapefruit, lemon, lime



The total import volumes of fresh fruits in 2010 were 1,784,135 tons a year to year 95% decrease. Oranges and avocados increased, but bananas and grapefruits that increased greatly year before dropped, and the overall import volume decreased as a whole. The top 3 exporting countries to Japan for fresh fruits are (share 96%), Philippines (share 74%, year to year 95%), US (share 17%, year to year 122%), and Mexico (share 5%, year to year 143%), followed by New Zealand, South Africa, and others. The top 5 imports (share 95%) are banana (share 65%), pineapple (share 12%), grapefruit (share 10%), lemon (share 5%), and avocado (share 3%).

In the fresh fruits market, due to the recent simplification of eating habits, supermarkets sell fresh fruits that are cut and ready to eat. There are assorted fruits that are arranged colorfully, and it answers the demand of people wanting to eat different types of fruits even if it costs more. Papaya, mango, and kiwi are put into these assorted fruit bowls for

its sense of high grade and colorfulness. These fruits are spreading to people who have not eaten them before. Also, domestic and imported fruits that are easy to eat with high sugar content are getting popular. The tendency to evaluate sweet fruits to be good is getting stronger, and the supermarket is showing the sugar content or they are actively giving out samples. Also, tropical fruits are getting the attention in the fruits market. In addition to bananas and pineapples, fruits that were not so familiar such as avocado, mango, papaya, and durian are starting to be sold in many places including super markets and convenience stores. The consumption is increasing because of this. Mango is especially increasing, as it is used for deserts at restaurants and convenience stores. The expensive image is starting to fade, and it is one of the products that are necessary in the market. At specialty stores that handle high grade items, there are many types of temperate fruits such as star fruits, dragon fruits, kiwano, rambutan, cherimoya, and mangosteen.