MINISTRY OF FOOD PROCESSING INDUSTRIES
GOVERNMENT OF INDIA

Country Profile: JAPAN

WORLD FOOD INDIA
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Processing for Prosperity

Food Processing

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Preface

The food processing sector serves as a critical engine of economic growth, food security, and global trade, bridging agriculture with industry and innovation. As countries seek to build sustainable and resilient food systems, international cooperation plays a vital role in unlocking shared opportunities across borders.

This Country Profile on Japan has been prepared as part of the knowledge and engagement initiative under World Food India 2025 (WFI 2025), a flagship platform of the Ministry of Food Processing Industries (MoFPI), Government of India. Japan is the "Focus Country in WFI 2025. The document provides a comprehensive overview of the Japan's evolving food processing ecosystem its market size, trends, policies, trade dynamics, and investment potential with a focus on identifying synergies between India and Japan.

As one of the world's leading export hubs and a regional pioneer in agri-tech innovation and food logistics, Japan offers significant prospects for collaboration across the food value chain. This profile aims to serve as a strategic reference for investors, policymakers, researchers, and business leaders seeking to explore avenues for bilateral partnerships in food processing, technology, trade, and infrastructure development.

World Food India 2025 reaffirms India's commitment to fostering global alliances, promoting inclusive innovation, and catalysing investments that contribute to a more sustainable and equitable global food system. We hope this Country Profile enables meaningful engagement and inspires impactful collaborations between India and Japan in the years to come.

1. Overview of the Global Food Processing Sector

1.1 Market Overview

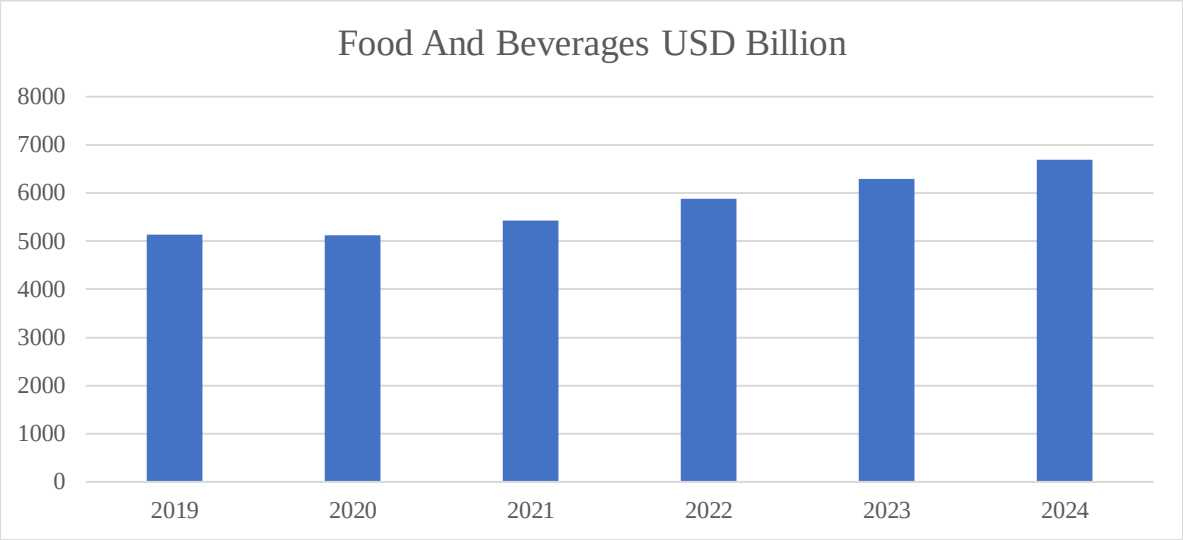
The food processing sector is involved in transforming raw agricultural products into processed food items that are suitable for consumption. It encompasses a wide range of activities, including harvesting, sorting, cleaning, packaging, preserving, and distributing food products. Food processing involves various techniques and technologies to enhance the quality, safety, and shelf life of food. Some common processes include cutting, grinding, cooking, pasteurization, canning, freezing, and dehydration. These processes often involve the use of machinery, equipment, additives, and other ingredients to modify the characteristics of the raw materials. The food processing sector plays a crucial role in meeting the global demand for safe, convenient, and nutritious food products. It not only helps to extend the availability of seasonal produce but also allows for the development of a wide variety of food options. This sector covers a broad range of products, including fruits, vegetables, grains, dairy products, meat, poultry, seafood, bakery items, beverages, and prepared meals. Food processing companies may operate at different scales, from small-scale local businesses to large multinational corporations. They must adhere to strict quality control and safety standards to ensure that the processed foods meet regulatory requirements and consumer expectations. Overall, the food processing sector contributes significantly to the economy, employment, and food security by adding value to raw agricultural products and making them suitable for consumption on a mass scale.

The food and beverages market size has grown strongly in recent years and is predicted to grow from USD 6962.47 billion in 2024 to USD 7400.31 billion in 2025 with a compound annual growth rate (CAGR) of 6.3%[1].

The chart and table below show the year-on-year growth of the global food and beverages market during 2019-2024[2]. The global food and beverages market grew from USD 5140.49 billion in 2019 to USD 6689.05 billion in 2024 at a compound annual growth rate (CAGR) of 5.41%.

[1] Food and Beverages Global Market Briefing 2025 – The Business Research Company
[2] Ibid

Figure 1: Global Food and Beverages Market, Historic Market Size, 2019-2024, USD Billion



1.2 Emerging Trends

The food and beverages market are being influenced by several significant trends, which are as follows[3]:

- Functional drinks for hydration & nutritional benefits
- High pressure pasteurization of fruits & vegetables
- Increasing demand for clean label products
- Individual quick freezing (IQF) technology
- Robotics and automation in meat processing
- Premium positioning of the pet food

[3] Ibid

2. Japan: Country Overview

Japan is an island country lying off the east coast of Asia. It consists of a great string of islands in a northeast-southwest arc that stretches for approximately 1,500 miles (2,400 km) through the western North Pacific Ocean. The following table highlights key facts about Japan.

Table 1. Japan - Key Facts	
Capital	Tokyo
Area	377,973 sq. km
Population (2023 estimates)[4]	124,516,650
Currency	Japanese Yen
Languages	Japanese, Amami, Kyuku, Kikai, Miyako
Life Expectancy	81 years (men), 88 years (women)
Prime Minister	Shigeru Ishiba
Global Population Rank	12
Urban – Rural Population (2023)[5]	Urban: 92% Rural: 8%

Japan - Economy Overview

Japan is the third-largest economy in the world with a GDP of USD 4.2 trillion and is a member of the G7 group of leading industrialized countries. Some key facts of the Japanese economy are listed below:

Table 2. Japan - Economy key facts	
Gross Domestic Product per capita (current USD) (2024)[6]	USD 32,475.90
GDP (current USD) (2024)[7]	USD 4.3 trillion
Exports of goods and services (% of GDP) (2023)[8]	21.8%
CPI Inflation (2024)[9]	2.7%
GDP Growth (annual %) (2024)[10]	0.1%
Average monthly consumption expenditure (March 2025)[11]	339,232 yen
Gross Domestic Savings (% of GDP) (2023)[12]	24.7

[4] https://data.worldbank.org/country/japan
[5] https://data.worldbank.org/indicator/SP.RUR.TOTL.ZS?locations=JP
[6] https://data.worldbank.org/country/japan
[7] Ibid
[8] Ibid
[9] Ibid
[10] Ibid
[11] www.stat.go.jp
[12] https://data.worldbank.org/indicator/NY.GDS.TOTL.ZS?utm_

3. Japan: Food Processing Sector Overview

5.1 Overview

The food processing sector creates a diverse range of foods, including western, Japanese, and infant and senior nutrition-focused foods. Culinary producers put a lot of effort into retaining market share for their established product lines while also coming up with new, exciting culinary items to appeal to consumers[13].

In 2024, Japan's food processing sector saw a 3.9% increase in the value of food produced, reaching a total of USD 174 billion. The rise in production was observed mainly in categories such as dairy products, alcoholic beverages, tea, coffee and cocoa, as well as health foods[14].

Supermarkets continue to dominate Japan's retail food sector, accounting for 74% of the market. The remaining 26% comprises food and beverage sales through convenience stores, pharmacies, and online platforms. A consistently growing segment within the industry is ready-to-eat meals and take-home food, reflecting changing consumer preferences for convenience[15]. In 2024, Japan ranked as the second-largest market in the Asia-Pacific food and beverage sector, contributing USD 314.08 billion to the region's total market value[16].

The top ten fastest-growing food product categories in Japan:

1. Meat products
2. Condiments and Sauces
3. Processed vegetables
4. Fish & marine products
5. Confectionary products
6. Dairy products (cheeses)
7. Tree nuts
8. Fresh fruits and Processed fruits
9. Tea based beverages

Japan's food industry operates through three main channels: Food industry gross sales, Food processing sector, and Consumer-oriented food imports.

Table 3: Composition of Japanese food industry by segments[17]

Food Industry by Channels (USD)	Market Share
Consumer-oriented Imports	USD 40 billion
Food Processing Industry	USD 174 billion
Food Industry Gross Sales - Retail sales (47%) - Food Service (53%)	USD 424 billion USD 198 billion USD 226 billion

Japan relies on imports from other countries for the bulk of its food supply. The United States was the leading supplier of consumer-oriented agricultural products with a 15% market share.

[13] USDA JAPAN – FOOD PROCESSING INGREDIENTS
[14] Food Processing Ingredients Annual USDA Japan
[15] Ibid
[16] Food and Beverages Global Market Briefing 2025 – The Business Research Company
[17] Ibid

The Japanese market is highly competitive with consumers seeking quality, value, and convenience[18].

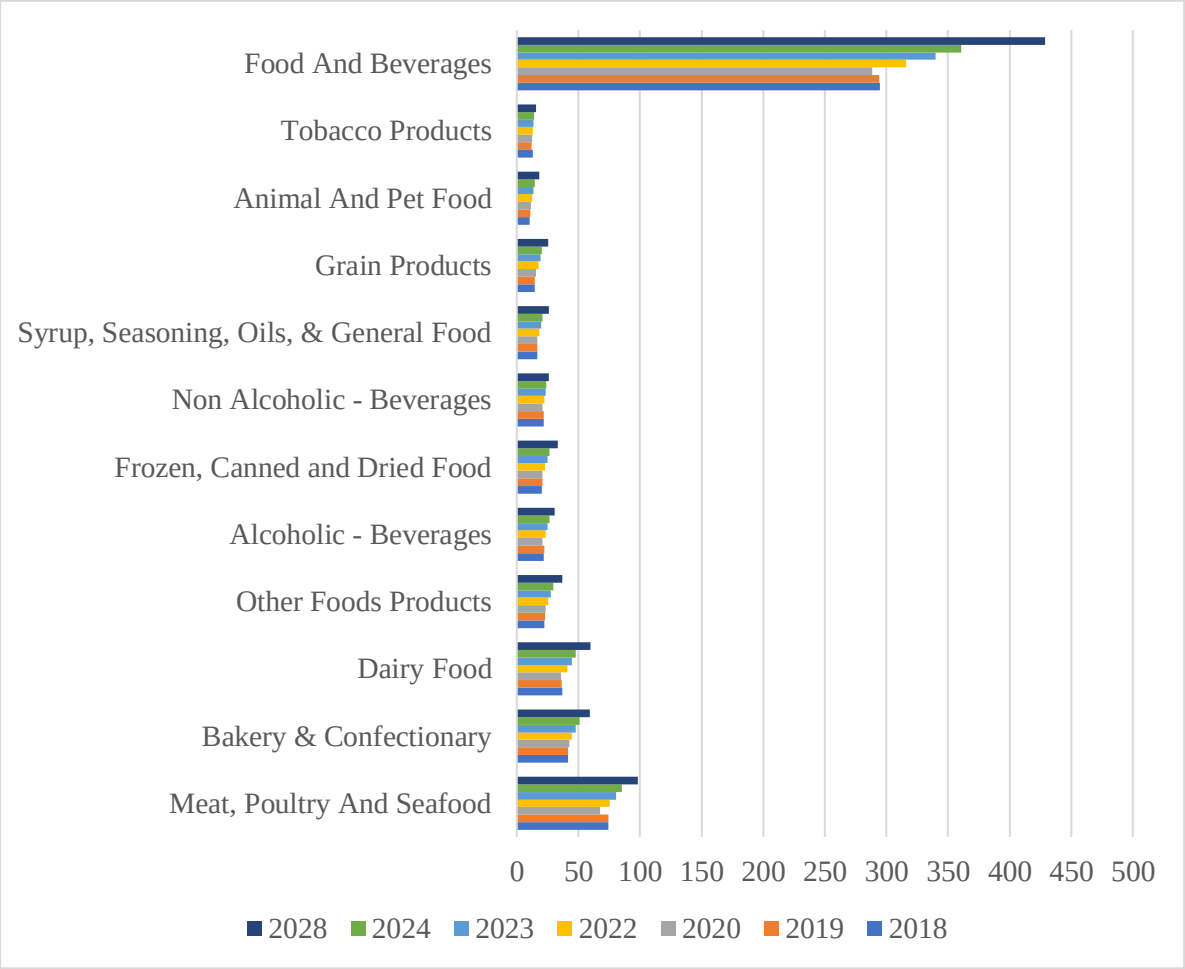
The Japanese food processing industry produces a wide variety of foods: traditional Japanese, western, and health-oriented foods for infants and elders. Food processors focus on maintaining market share among traditional product lines while developing creative and innovative food products to attract consumers[19].

Many of Japan's largest food processing companies originated as traditional breweries and gradually diversified their portfolios to include a wide range of products such as distilled spirits, non-alcoholic beverages, and processed foods. Similarly, several leading firms in the sector have evolved from the dairy industry, expanding into health foods and value-added dairy products[20].

Frozen foods consumption has doubled over the past two decades and continues to grow due to convenience and improvements in product quality and safety. In recent decades, at-home cooking gradually declined and convenience and packaging - especially single serving sizes became critical factors in product development. However, since the beginning of the COVID-19 pandemic, consumers have increasingly sought foods and beverages to prepare at home that are as delicious as restaurant gourmet, entertaining, easy-to-prepare, and healthy[21].

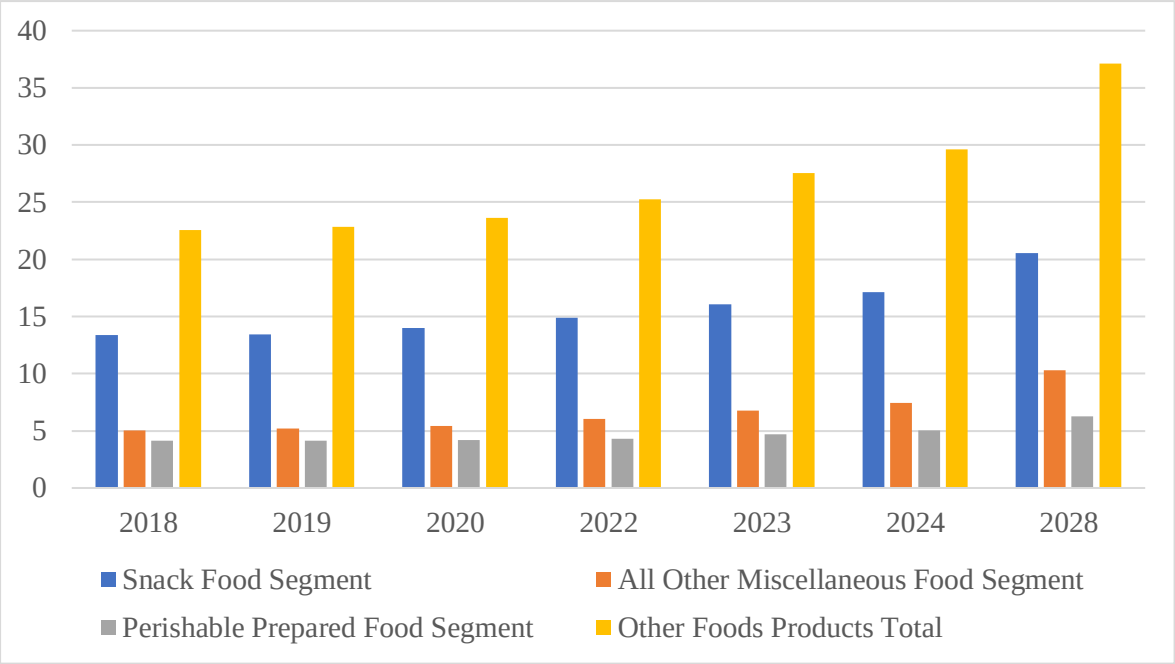
[18] https://www.usdajapan.org/market-research/reports/sector_reports/11428/
[19] Acquis data industry snapshot – Japan food processing
[20] Ibid
[21] Ibid

Figure 2: Japan Food and Beverages Market, Segmentation by Type, Historic and Forecast, 2018-2028, USD Billion[22]



[22] TBRC- Japan Food & Beverages Market Briefing 2024

Figure 3: Japan Other Foods Products Market, Split by Type, Historic Forecast Market Size, 2018-2028, USD Billion[23]



5.2 Notable Market Changes

The following highlights key market shifts along with new government initiatives and policy interventions [24]:

- In 2024 after 24 years, Japan revised its Basic Law on Food, Agriculture, and Rural Areas - the first full-scale amendment since its enactment in 1999. The government also adopted bills to allow it to instruct private farmers to boost production or promote product conversion when serious food shortages are expected[25].

- In 2024, Japan experienced a record-high average food price increase of 17%, surpassing the 15% rise recorded in 2023 across 32,396 product items. Despite the higher rate, the total number of food price hikes dropped significantly, with 15,520 items affected - a 60% decrease compared to the previous year. Price increases varied by category, with wheat flour rising by 25%, beverages (including alcoholic) by 23%, chocolate and other confectionery by 18%, seasonings by 16%, processed meats like ham and sausage by 14%, dairy products by 10%, and bread by 8%.

- 'Washoku' (Japanese cuisine), commemorates the ten-year anniversary since being designated as an Intangible Cultural Heritage by the United Nations Educational Scientific and Cultural Organization (UNESCO). Since its registration in 2013, Washoku has gained international popularity, and the number of Japanese restaurants abroad has tripled, garnering attention for various Japanese ingredients such as lotus root and Japanese white radish.

[23] TBRC- Japan Food & Beverages Market Briefing 2024
[24] USDA JAPAN – FOOD PROCESSING INGREDIENTS
[25] Basic Law / Basic Policy Plan: MAFF

4. Japan: Food Processing Sector Key Drivers & Trends

Japan's food processing sector plays a vital role in the national economy, handling the transformation and packaging of food products for both domestic consumption and international export. Below are some of the key drivers that are shaping the food processing sector in Japan:

- **Continued diversification of diet, increased demand in pre-prepared foods/ready-to-eat meals**

  The Japanese diet has been diversifying in recent years, with consumers becoming more interested in trying new foods from around the world. This has led to an increase in demand for pre-prepared foods, as people are looking for convenient ways to try new dishes. The food processing industry is responding to this trend by developing new products that are both authentic and convenient.

- **Heightened consumer and retailer food safety concerns**

  In recent years, there have been several food safety scandals in Japan, which has led to heightened consumer and retailer concerns about food safety. This has created an opportunity for the food processing industry to develop new products that are safe and reliable. The industry is also responding to this trend by investing in new technology and training programs to ensure the safety of its products.

- **Increasing interest in health and functional foods with an emphasis on the needs of the aging population**

  The Japanese population is aging, and this is leading to an increase in demand for health and functional foods. These are foods that are designed to improve health or provide specific health benefits. The food processing industry is responding to this trend by developing new products that are both healthy and convenient.

- **Reduced or cheaper inputs to include international processing options to maintain competitive prices**

  The cost of food inputs in Japan is relatively high. This has led some food processors to look for ways to reduce their costs by including international processing options. This means processing food in other countries where the cost of inputs is lower. The food processing industry is also responding to this trend by investing in new technology that can help to reduce costs.

5. Food Processing: Key Stakeholders in Japan

The food processing sector in Japan is governed and regulated by various institutions, which is crucial for strengthening and supporting the industry. Some of the key stakeholders in the sector are as listed below.

7.1 Government Institutions

Name	Objective
The Ministry of Agriculture, Forestry and Fisheries (MAFF)	The MAFF is responsible for promoting the agricultural and fishery industries in Japan. This includes ensuring that food and beverages produced in Japan meet high standards of quality.
The Ministry of Health, Labour and Welfare (MHLW)	The MHLW is responsible for ensuring the safety of food and beverages in Japan. It does this by enforcing several laws and regulations, including the Food Sanitation Act, the Food Labelling Act, and the Food Additives Act.
The Consumer Affairs Agency (CAA)	The CAA is responsible for protecting the rights of consumers in Japan. This includes ensuring that food and beverages are safe and that consumers are informed about the products they are buying.

7.2 Major Industry Players[26]

Companies	Sector	Core competency
Ajinomoto Co., Inc.	Food & Amino acids	Seasonings and Foods, Frozen Foods, Umami
Asahi Group Foods Ltd.	Beer, alcohol, and non-alcoholic beverages	Asahi Super Dry, Peroni Nastro Azzurro, Pilsner Urquell, Grolsch, and Kozel, whiskey, spirits, and wine
Kyokuyo Co., Ltd.	Marine products	Sushi toppings, sliced fish, and grilled fish
Nippon Suisan Kaisha, Ltd.	Marine, food products, fine chemicals	Salmon, pollock, yellowtail, shrimp, tuna, and crab. Fish-based ingredients and processed foods.
Suntory Spirits Limited	Alcoholic beverages	Alcoholic beverages

[26] www.trademap.org

6. Japan: Trade Overview

Japan holds a significant trading position in Asia and maintains strong relations with European countries, driven by its technological innovation and global economic influence. Considering the overall trade of Japan, the following sections indicate key export and import products along with Japan's trading partners.

Table 4: List of top products at 6-digit level exported by Japan[27]

Product Label	Value exported in 2024 (USD '000)
Processed food and agro-based products	6115271
Food preparations	746849
Preparations for sauces and prepared sauces; mixed condiments and seasonings	458181
Bread, pastry, cakes, biscuits and other bakers' wares, whether containing cocoa; communion	343874
Cider, perry, mead, saké and other fermented beverages and mixtures of fermented beverages	304172
Whiskies	288582
Scallops and other molluscs of the family Pectinidae (frozen, even in shell)	262482
Non-alcoholic beverages (excl. water, fruit or vegetable juices, milk and beer)	251609
Molluscs, even in shell, frozen (excl. oysters, scallops of the genera Pecten, Chlamys or Placopecten	146372
Beer made from malt	139131
Sugar confectionery not containing cocoa, incl. white chocolate (excl. chewing gum)	131856
Mixtures of odoriferous substances and mixtures, incl. alcoholic solutions	258171
Waters, incl. mineral and aerated, with added sugar, sweetener or flavour, for direct consumption	126674
Scallops, incl. queen scallops, prepared or preserved (excl. smoked)	117127
Pasta, cooked or otherwise prepared (excl. stuffed)	115553
Animal or vegetable fats and oils and their fractions, boiled, oxidised, dehydrated, sulphurised	113419
Soups & broths and preparations	106670
Wheat or meslin flour	102466
Prepared or preserved fish (excl. whole or in pieces)	99227
Food preparations for infant use, put up for retail sale, of flour, groats, meal, starch	97461

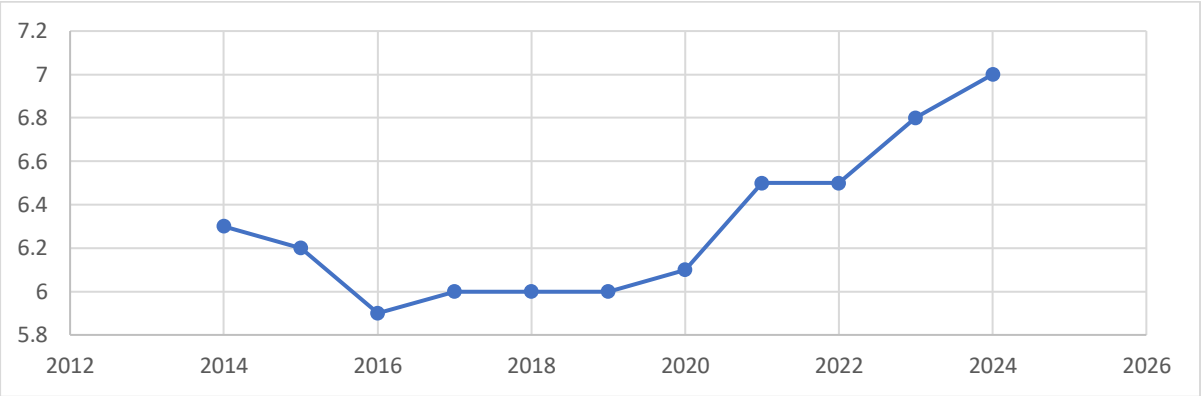
[27] www.trademap.org

Table 5: List of top products at 6-digit level imported by Japan[28]

Product Label	Value imported in 2024 (USD '000)
Processed food and agro-based products	35750129
Meat or offal of fowls of the species "Gallus domesticus", prepared or preserved (excl. sausages)	2279966
Chewing tobacco, snuff and other manufactured tobacco and manufactured tobacco substitutes	2170597
Frozen shrimps and prawns, even smoked, whether in shell or not, incl. shrimps and prawns	1231538
Tobacco, "homogenised" or "reconstituted" from finely chopped tobacco leaves, tobacco refuse	1161549
Cigarettes, containing tobacco	1086669
Food preparations, (not elsewhere specified)	958190
Wine of fresh grapes, incl. fortified wines, and grape must whose fermentation has been arrested	932642
Oilcake and other solid residues, whether ground or in the form of pellets	859683
Cheese (excl. fresh cheese, incl. whey cheese, curd, processed cheese, blue-veined cheese	808503
Dog or cat food, put up for retail sale	748266
Raw cane sugar, in solid form, not containing added flavouring or colouring matter (excl. Cane etc.)	720244
Potatoes, prepared or preserved otherwise than by vinegar or acetic acid, frozen	714439
Swedes, mangolds, fodder roots, hay, lucerne "alfalfa", clover, sainfoin, forage kale, lupines	670460
Palm oil and its fractions, whether or not refined (excl. chemically modified and crude)	653297
Sparkling wine of fresh grapes	646087
Semi-milled or wholly milled rice, whether or not polished or glazed	613878
Shrimps and prawns, prepared or preserved, not in airtight containers (excl. smoked)	584771
Cuttle fish and squid, frozen, with or without shell	536148
Bread, pastry, cakes, biscuits and other bakers' wares, whether or not containing cocoa; communion	525586
Whiskies	493368

[28] www.trademap.org

Figure 4: Japan estimated Food and Beverage market revenue as a proportion of GDP (2014-2024) as %[29]



8.1 Key Export Products & Partners

Top exported items and destinations in Japan (2023).

Table 6: Japan exports of goods to the top 5 countries, main commodity and total value, 2024[30]

Partner country	Main commodity	Total value 2024 (USD '000)	Total commodity value 2024
China; Hong Kong	Food preparations (not elsewhere specified)	China - 190,309 Hong Kong - 101,752	820,051
USA; Thailand; Hong Kong	Scallops and other molluscs of the family Pectinidae, frozen, even in shell	USA - 125,775 Thailand - 27,765 Hong Kong - 77,016	406,606
South Korea	Beer made from malt	56,101	139,131
Singapore	Animal or vegetable fats and oils and their fractions, boiled, oxidised, dehydrated, sulphurised	50,608	113,419
United Kingdom; USA	Preparations for sauces and prepared sauces; mixed condiments and seasonings (excl. soya sauce, etc.)	United Kingdom - 11,963 USA - 105,285	458,181

Japan's export data as highlighted in the table indicates that China, USA, South Korea, Thailand, Singapore forms the top 5 destination of overall exports from Japan. Some other export markets include Germany, Canada, Mexico, United Kingdom, India and Australia[31].

[29] www.trademap.org
[30] https://www.trademap.org/Bilateral_TS.aspx?nvpm=1%7c392%7c%7c764%7c%7cTOTAL%7c%7c%7c2%7c1%7c1%7c2%7c2%7c1%7c1%7c1%7c1%7c1
[31] Ibid

8.2 Key Import Products & Partners

Japan's top imports and their corresponding trading partners are listed in the table below.

Table 7: Japan's imports of goods from top 5 countries, main commodity and total value, 2024[32]

Partner country	Main commodity	Total value in 2024 (USD Thousands)	Total commodity value 2024
China; Thailand	Meat or offal of fowls of the species "Gallus domesticus", prepared or preserved (excl. sausages, etc.)	China- 781,105 Thailand- 1,458,885	2,279,966
USA; Netherlands	Potatoes, prepared or preserved otherwise than by vinegar or acetic acid, frozen	USA- 458,537 Netherlands- 73,677	714,439
Australia	Raw cane sugar, in solid form, not containing added flavouring or colouring matter (excl. cane, etc.)	643,393	720,244
Singapore	Chocolate and other food preparations containing cocoa, in blocks, slabs or bars weighing, etc.	125,392	300,289
United Kingdom	Whiskies	356,191	493,368
Netherlands; Australia	Cheese (excl. fresh cheese, incl. whey cheese, curd, processed cheese, blue-veined cheese and, etc.	Netherlands- 99,378 Australia- 131,308	808,503
USA; Australia	Preparations of a kind used in animal feeding (excl. dog or cat food put up for retail sale)	USA-142,095 Australia- 45,439	463,051
United Kingdom; Thailand	Dog or cat food, put up for retail sale	United Kingdom- 19,276 Thailand- 309,713	748,266

[32] ITC TRADE MAP: JAPAN IMPORTS WITH WORLD

7. Japan – India Trade

Japan and India share a longstanding trade relationship, with Japan emerging as a vital economic partner in fostering growth, innovation, and collaboration between the two nations.

9.1 Japan's Exports to India

In 2024, Japan's total exports of processed food and agro-based products to India amounted to USD 25,798.

The table below presents the top five Japanese exports to India over the past three years, categorized at the 6-digit HSN Code level and measured in USD thousands.

Table 8: Top 5 Japan's Exports to India over the last three years (from 2022-2024)[33]

HSN Code	Product label	2022	2023	2024	% Growth from 2023-2024	India's % share in Japan's world exports 2024
330290	Mixtures of odoriferous substances and mixtures (including alcoholic solutions)	10549	8420	5206	-38.2%	0.085%
220830	Whiskies	3219	3439	3772	9.68%	0.0618%
210690	Food preparations items	1609	1758	1712	-2.62%	0.028%
150420	Fats and oils of fish and their fractions	1566	5244	6864	30.9%	0.11%
220850	Preparations for sauces and prepared sauces; mixed condiments and seasonings (excl. soya sauce etc)	640	1282	1033	-19.4%	0.017%

In 2024, Japan's leading export commodity to India in the processed food and agro-based category was odoriferous substances. Other notable exports, such as dish fats/oils and prepared sauces, experienced remarkable growth, with year-on-year increases of 338.31% and 61.41%, respectively. Additionally, Japan exported significant volumes of food preparation items and alcoholic beverages, among other products.

9.2 Japan's imports from India

Total Japanese imports from India amounted to USD 6.53 billion in 2022 (an increase of 6.2% or USD 382 million compared to 2021). The table below indicates Japan's top 5 imports from India in the segment of processed food and agro-based products over the last three years captured at 6-digit HSN Code in USD thousands.

[33] https://www.trademap.org/Bilateral_TS.aspx?nvpm=1%7c392%7c%7c764%7c%7cTOTAL%7c%7c%7c2%7c1%7c1%7c2%7c2%7c1%7c1%7c1%7c1%7c1

Table 9: Japan's Top 5 Imports from India over the last three years (2022-2024)

Top 5 Japanese import from India (USD Thousands)						
HSN Code	**Product label**	**2022**	**2023**	**2024**	**% Growth 2023-2024**	**India's % share in Japan's world import (2024)**
030617	Frozen Shrimps & Prawns	334043	281245	285059	1.36%	0.89%
230400	Oilcake and other solid residue	43826	48109	33433	-30.5%	0.10%
151530	Castor Oil	33280	28129	25387	-9.8%	0.08%
382319	Fatty acids, industrial, monocarboxylic; acid oils from refining	30667	23921	25399	6.18%	0.08%
230120	Flours, meals and pellets of fish or crustaceans, molluscs or other aquatic invertebrates, unfit for human consumption	25974	59264	29051	-50.98%	0.09%

- Frozen shrimps & prawns formed a major share of products imported by Japan from India, in 2024.
- The value of top two imported food products touched a threshold of USD 285 million and USD 33.40 million in 2024 respectively.
- Other important products imported include Castor oil, acid oils from refining, flours, molluscs, etc.

8. Areas of Collaboration

India and Japan have strong bilateral relations and can collaborate in various areas within the food and beverage processing sector. Here are some potential areas of collaboration:

1. **Agri-Food supply chain enhancement:** India has a diverse agricultural base, while Japan possesses advanced technology and expertise in agriculture and food processing. Collaborating to improve the efficiency, quality, and sustainability of the agri-food supply chain could benefit both countries.
2. **Technology Exchange:** Japan is known for its advancements in food processing and preservation technologies. Collaborative efforts could involve sharing technology and best practices in areas such as cold storage, packaging, food safety, and quality control.
3. **Research and Development:** Both countries can work together on joint research projects to develop new and improved food products, processing methods, and technologies. This can include innovative approaches to food preservation, functional foods, and value-added products.
4. **Culinary Exchange and Promotion:** India and Japan can promote cultural understanding through culinary exchanges. Initiatives like food festivals, workshops, and culinary tours can facilitate the sharing of traditional dishes, cooking techniques, and ingredients, fostering cultural appreciation.
5. **Skill Development and Training:** Japan's expertise in precision and high-tech agriculture can benefit Indian farmers. Collaborative programs could offer training and skill development to farmers in India, helping them adopt modern agricultural practices for improved productivity and sustainability.
6. **Trade and Investment:** Encouraging trade and investment in the food and beverage sector can lead to economic growth for both countries. Joint ventures, partnerships, and investments can help in the exchange of products, technologies, and expertise.
7. **Food Safety and Standards:** Cooperation in food safety regulations and standards can ensure that the products exported and imported between the two countries meet the highest quality and safety requirements, building consumer confidence.
8. **Promotion of Traditional Foods:** Both India and Japan have rich culinary traditions. Collaborating to promote and preserve traditional foods can lead to increased cultural understanding and appreciation, as well as economic opportunities for local producers.
9. **Sustainable Agriculture and Food Security:** Collaborative efforts can address challenges related to sustainable agriculture, food security, and reducing food waste. Sharing knowledge and technologies for sustainable farming practices can have positive impacts on both countries' food systems.
10. **Value-added Products:** Collaboration in creating value-added products, such as functional foods, organic products, and niche items, can open up new markets and opportunities for entrepreneurs and small-scale producers.
11. **Food Tourism:** Both India and Japan have a rich food culture that can attract tourists. Joint efforts to promote food tourism can boost the economies of both countries and enhance cultural exchange.
12. **Joint Food Research Centres:** Establishing joint research centres dedicated to food science and technology can facilitate ongoing collaboration, innovation, and knowledge sharing between researchers from both countries.

9. Conclusion

Japan's food processing sector stands as a dynamic and technologically advanced segment of its economy, contributing significantly to domestic food security, consumer satisfaction, and international trade. With a market value exceeding USD 174 billion in 2024, the industry showcases a strong balance between tradition and innovation. While deeply rooted in cultural staples such as *washoku*, Japan's producers have embraced global trends, from ready-to-eat meals to health-oriented functional foods, positioning the country as both a custodian of heritage and a leader in modern processing techniques. This dual focus not only sustains domestic demand but also fuels export growth to key markets in Asia, North America, and beyond.

The sector's strength is underpinned by robust policy support, high consumer expectations for quality and safety, and an unwavering commitment to research and technological advancement. Japan's 2024 revision of its Basic Law on Food, Agriculture, and Rural Areas reflects a proactive approach to addressing emerging challenges, from price fluctuations to food security risks. Such measures, coupled with advanced cold chain logistics, automation, and premium product positioning, enable Japan to maintain its competitive edge in a market increasingly shaped by convenience, sustainability, and health-conscious consumption.

In this context, India emerges as a natural partner for collaboration. India's agricultural diversity, competitive production base, and growing processing sector align seamlessly with Japan's technological strengths, quality standards, and appetite for diverse food products. Joint initiatives in supply chain optimization, R&D, sustainable agriculture, and skill development could bridge market gaps while enhancing resilience for both nations. The scope for cooperation spans high-value categories like marine products, condiments, functional foods, and ready-to-eat meals, alongside capacity building in packaging, storage, and quality certification.

Looking ahead, fostering a Japan–India partnership within the food processing and allied sectors could deliver long-term benefits in trade, technology transfer, and cultural exchange. By aligning Japan's precision-driven innovations with India's scale and resource base, the two countries have the potential to create a sustainable, mutually beneficial food ecosystem. Such collaboration would not only address the evolving demands of their domestic consumers but also position them as joint leaders in shaping the future of the Asia-Pacific food economy.

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Processing for Prosperity
BHARAT MANDAPAM, NEW DELHI

About World Food India

A global event to facilitate partnerships between Indian and international businesses and investors, World Food India (WFI) is a gateway to the Indian food economy and an opportunity to showcase, connect and collaborate.

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