

Japan Edible Oils Market Assessment, By Nature [Organic, Conventional], By Product Type [Olive Oil, Palm Oil, Rapeseed Oil, Sesame Oil, Sunflower Oil, Others], By Packaging Type [Cans, Bottles, Pouches, Jars, Others], By Application [Seasoning, Frying, Baking, Food Processing, Others], By Region, Opportunities and Forecast, FY2018-FY2032F

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Report description:

Japan edible oils market is projected to witness a CAGR of 3.3% during the forecast period FY2025-FY2032, growing from USD 2.70 billion in FY2024 to USD 3.50 billion in FY2032. Japanese consumers prioritize health, leading to a preference for oils perceived as healthier, such as olive oil and sesame oil. Olive oil, in particular, has gained popularity due to its association with the Mediterranean diet, known for its heart-health benefits. Because of the health benefits derived from various edible oils, health-conscious consumers seek oils which are rich in unsaturated fatty acids, such as avocado and flaxseed oil, their consumption becomes highly demanded. In April 2024, the prices of olive oil have been witnessing expansion due to the poor harvest of olives in the region. Nisshin OilIIO Group would raise the price of the 456-gram Bosco Extra Virgin Olive Oil by 50% while the prices of J-Oil Mills' household products are expected to go up by 32% to 66%.

The market has experienced significant growth in recent years due to a rise in culinary applications and is expected to maintain a strong pace of expansion in the coming years as it is a necessity product in cooking. Traditional oils such as sesame oil and rice bran oil hold a significant place in Japanese cuisine. Sesame oil is commonly used for its distinctive flavor in dressings, marinades, and stir-frying, while rice bran oil is valued for its high smoke point and mild flavors.

Some Japanese cuisine incorporates light and healthy methods of cooking, such as steaming and sauteing, which requires the availability of oils which have a low smoking point such as soybean oil to drive the market growth.

Various traditions of cooking, like deep-frying in Asian countries and olive oil being part of the Mediterranean diet, generate demand for different edible oils. Large volumes of oil are used in traditional food preparation in Japan during festivals and

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celebrations, thereby improving seasonal consumption.

Soybean Oil Fostering the Growth

Soybean oil had a presence in Japanese cuisine for centuries, mostly used in the traditional dishes such as tempura and stir-fries. It is because neutral flavor make it versatile and suitable for all sorts of uses.

Soybean oil is rich in polyunsaturated fats, including omega-3 and omega-6 fatty acids, which are good for heart health, appealing to the health-consciousness of Japanese consumers. Moreover, this oil has a significant content of vitamin E, which assists cell protection against damage, further appealing to the consumers.

Furthermore, soybean oil is a rather inexpensive edible oil as compared to most other edible oils available in the market, for instance, olive or avocado oil. Its price factor makes soybean oil quite practical for use either in households or the food industry. Domestic soybean oil production helps supply stable volumes due to huge imports of soybeans into Japan at competitive prices. According to Foreign Agricultural Service of the US Department of Agriculture (USDA) report published in April 2022, the demand for Soybean oil spiked in Japan after COVID-19. As per the estimates, in the beginning of 2022, the demand for soybean oil increased and surpassed the demand for rapeseed oil.

Consumers' Increasing Preference for Fried Food

The staples of Japanese cuisine such as Tempura, tonkatsu, and karaage are fried foods which require greater consumption of edible oils. These require a large quantity of oil to be deep-fried in, thereby increasing the intake of edible oils to drive the market growth.

Food service industries like restaurants and other fast-food chains, use huge amounts of edible oils to fry foods. Countless street food vendors and kiosks sell a wide array of fried snacks to attract customers. Some items such as croquettes and tempura have particularly high demand and are easily available, which further augments the market growth.

Increasing consumption of fried foods in Japan increases the household use of cooking oils. Fried foods are regularly prepared by home cooks. As a result, edible oils become part of the standard contents of the kitchen.

Additionally, increased popularity for pre-packaged, ready-to-fry, pre-fried, and ready-to-eat meals among busy consumers adds to demand for edible oils in food processing and manufacturing.

Japan is a significant importer of oil seed at global level. As of 2022, Japan imported 5.94 million metric tons of oilseed. Nigeria is the largest exporter of oil seeds to Japan.

Versatility of Edible Oils to Gain Traction in the Market

Uses of edible oil are not just restricted to cooking. It is used in food processing for margarine, salad dressings, baked goods, and other such food products that drive higher consumption. Edible oils find application in a variety of cooking methods such as frying, sauteing, baking, and salad dressing. These oils such as olive, canola, and sunflower are used by the consumers due to their diversity.

Different oils bring out different tastes of dishes. Extra virgin olive oil is mainly preferred for Mediterranean dishes. Edible oils are basic needs in the processing of most foods, especially snack foods, margarine, and baked goods. Demand for these ensures high oil consumption. Food service establishments will always have a demand for edible oils in their varied cookeries.

For instance, in March 2024, Starbucks' popular beverage, Oleato was made available in over 500 Starbucks stores across Japan. The beverage is a blend of extra virgin olive oil from the Italian brand Partanna and Starbucks coffee.

Future Market Scenario (FY2025 - FY2032F)

The edible oils market in Japan is expected to witness expansion in the forecast period due to the rise in the local production of edible oils. While Japan imports a significant portion of its edible oils, an increasing focus on local production, particularly for specialty oils such as shiso oil and perilla oil is expected to gain popularity in the forecast period. These locally produced oils cater to niche markets and traditional culinary uses, which comprises an essential part in Japanese cooking, enhancing the consumer experience and driving the market growth.

Key Players Landscape and Outlook

Key players in the market are helping the growth by focusing on continuous product innovation, retail expansions, and strategic marketing. The manufacturers are actively expanding their product portfolio, increasing the base of the customers, and catering to their evolving needs.

The key players are incorporating sustainable production processes to benefit both consumers and the environment. This act of

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responsible production of key players is helping the key players in gaining recognition among the consumers. In March 2022, Fuji Oil Co., Ltd. received the Ministry of Agriculture, Forestry and Fisheries Award due to its sustainable practices. Fuji Oil Co., Ltd. had a score in climate change as A- in 2022, but still made the A list in water security and deforestation.

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*Companies mentioned above DO NOT hold any order as per market share and can be changed as per information available during research work.

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