

CONSUMPTION PATTERNS

GENERAL TRENDS

Total food expenditures and expenditures specifically on fish and shellfish, meat, dairy products and egg, eating-out and pre-cooked food, experienced significant growth over the period of 1973 to 1976. These increases slowed after 1976 with the exception of eating-out and precooked foods. Eating-out's share of total yearly food expenditures increased from 9.9% in 1970 to 16.6% in 1992, while pre-cooked's share rose from 3.5% to 8.1% over the same period.

While the share of expenditures on fish and shellfish as part of total food expenditures were stable at the 13% range, the meat share fell from the 10% range for the period 1972-1987 to the 9% range in the period 1988-1992. The share of dairy products and eggs have been falling from the highest 7.2% in 1970 to 4.2% in 1988 and 4.3% in 1992. However, this does not necessarily mean that the consumption of dairy products and eggs has decreased in Japan but that the price of eggs has decreased.

Leisure time is of increasing importance to the Japanese. A recent poll by the Japanese prime minister's office indicated that only one in five Japanese surveyed was willing to sacrifice leisure time for more money. The average Japanese worker put in 2,044 hours in 1990. Although 32 hours less than the previous year, it is still some 200-400 hours more than the average North American.

The Japanese consumer, since the mid-1970's, has experienced a steady appreciation in real income. During the period 1971-1992, the average real annual family income increase of 453% would seem to indicate an improved standard of living for the consumer. Reflecting the increasing wealth of Japan's households, Engel's coefficient, which is food expenditures as a percentage of living expenditures, fell from 34.1% in 1970 to 24.7% in 1992.

EXPENDITURE TRENDS

Over the period 1985-1992, while expenditures on fish and shellfish increased by 8.6%, those on meat decreased by 0.1%. Expenditures on pre-cooked foods and eating-out increased significantly over the same period, the former by 46.0% and the latter 24.7%.

SEAFOOD EXPENDITURES BY TYPE OF PRODUCT

While there was a decrease in 1987 and 1988, generally expenditures on fish and shellfish have been stable 1985-1992. Fish paste products saw considerable decreases in 1989 and 1990 but has since started catching up with previous expenditure levels. A major reason for this decrease was the price hike for surimi, the basic material for fish paste products, which caused a substantial increase in the price of fish paste products and therefore consumers refrained from buying these items. However, as the price of surimi has gone down, the price of fish paste products has followed since.

REGIONAL EXPENDITURES

Seafood expenditures are generally higher in the northern regions such as Tohoku and Hokuriku and tend decline as one moves south. Meat expenditures have the opposite pattern: the percentage of food expenditures used for meat is highest in the south of Japan and declines as one moves north. The Kinki and Kyushu regions, which combined for 29% of Japan's population, had the largest expenditures overall in 1992.