

Table 5

Japanese Food Service Industry Consumption of Domestic and Imported Foodstuffs (1980) (¥ billion)

	Domestic Foodstuffs	Imported Foodstuffs	Imports as a % of Domestic
Total Farm Produce	420.6	19.3	5
Fruit	32.9	15.0	46
Pulses	2.9	1.9	65
Other Farm Produce	384.8	2.4	1
Total Seafood	314.5	38.9	12
Total Meat	465.9	56.4	12
Total Processed Food	1 745.7	142.5	8
Processed Fruit and Vegetable	49.0	8.5	17
Processed Seafood	153.2	74.7	49
Alcoholic Beverages	665.4	29.1	4
Dairy Products	83.4	3.2	4
Bread and Noodles	225.8	3.9	2
Sugar	45.3	2.1	5
Other Processed Food	523.6	21.0	4
Total	2 946.1	257.1	9

Source: Ministry of Agriculture, Forestry and Fisheries, 1984.

A key aspect regarding food imports by the food service sector is the tremendous skew toward Western-style family restaurants and fast food chains. Indeed, the Japanese Food Service Association noted that as much as 70 per cent of the food materials used by this sub-sector is imported. This further explains why this segment of the food service industry has been identified as potentially significant for Canadian food exporters.

3 Structure of the Food Service Industry

A breakdown of the industry is given in Table 6. Total industry sales in 1987 amounted to ¥21.3 trillion (\$205 billion Cdn) or 6.2 per cent of total GNP. The figures are broken down into "mainly" food and "mainly" drinking establishments, though many of the drinking establishments provide a full complement of food, and virtually all restaurants in Japan serve alcohol. The line between bars and restaurants is considerably less clear in Japan than it is in Canada.

General Restaurants

Shokudo

The most common type of restaurant is the shokudo (direct translation is "eating hall"). Shokudos constitute about one-seventh of the 838 000 eating and drinking establishments in Japan (1982 survey) with total sales of 1 653 billion yen in 1986. Shokudos are generally of simple decor — masonite tables, steel frame chairs — and serve basic, inexpensive food along with beer and other beverages. A typical meal in a shokudo will consist of grilled fish, miso soup, pickled vegetables, and rice. Other foods may include:

- deep fried breaded pork cutlet with cooked egg and onions served on a bed of rice;
- fried chicken, egg and onions served on a bed of rice;
- noodles and vegetables in a soya sauce-based soup;
- fried pork and ginger with rice and miso soup;
- croquettes with rice and miso soup;
- hamburger steak with rice;
- lightly spiced curry made with beef or pork and served with rice and chutney (always eaten with a tablespoon).