

Japanese Food Overseas: Past and Present

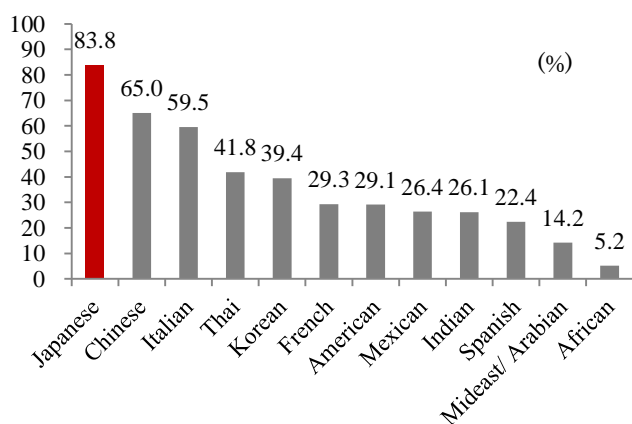
Japanese food is popular as a type of “health food.” The global Japanese food boom started with sushi, which spread throughout the U.S. due to a health conscious trend during the 1970s. Subsequently, sushi spread to Europe and the rest of the world. The explosive popularity of Japanese food outside Japan underwent qualitative changes over time, and eventually people began to demand more “realistic” Japanese food. This article re-examines the transformations experienced by the Japanese food boom and probes the underpinnings of the enduring popularity of Japanese food.

Delicious “Healthy Food”

According to a JETRO survey (Note 1) of consumers outside Japan, “Japanese food” was the top response to the question, for “What is your favorite foreign food?” (Figure 1). Behind the popularity of Japanese food lies an increase in health consciousness. An image has been established in which “Japanese food” equals “healthy food.” This is shown by the fact that, in the same survey, when Americans were asked why they go to Japanese restaurants, the second most common response after “I like the flavor” was “It’s healthy” (Figure 2).

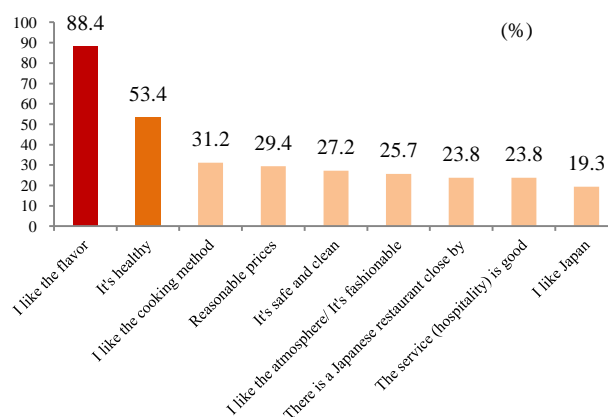
What causes Japanese food to be rated as “healthy food”? In a word, it is the nutritional balance. A traditional Japanese meal is composed of rice, soup, a main dish, and two side dishes. According to Shigetoshi Nagasawa, president of Hakubaku, a company that produces grains, Japanese food is exemplary because “The staples are grains such as rice and barley, which do not require oil to cook. The focus is on an intake of carbohydrates (starch) and protein, and it is nutritionally rich and balanced.”

Figure 1: Favorite Foreign Food that You Eat at Restaurants



Note: Multiple responses were possible to the question “What is your favorite foreign food that you eat at restaurants?” The numbers represent the percentage of respondents who selected that cuisine. Selection of one’s own country’s cuisine was not an option
 Source: Figures 1 and 2 are both from JETRO’s “Survey of Overseas Consumers concerning Japanese Food”(December 2012).

Figure 2: Question to Americans: Why do you go to Japanese restaurants?



Note: Multiple responses were possible. The numbers represent the percentage of respondents who selected that answer. (Respondents: 378)

U.S. Food Situation Ignites a Fad

Since ancient times, Japanese food has fostered the health of the Japanese people. Thus, what triggered such a demand for it overseas? Most likely, it was the food conditions during the 1970s in the U.S. that caused Japanese food to become popular there, igniting a real Japanese food fad.

In the latter half of the 1960s in the U.S., there was an upsurge in people suffering from lifestyle diseases, causing the cost of health care to balloon nationally and resulting in a higher fiscal deficit. Thereupon, to improve the American diet so as to reduce health care expenditures, the Senate issued a recommendation, titled “Dietary Goals for the United States,” commonly called the “McGovern Report,” in 1977. The report recommended that people consume carbohydrates (starchy material) in the form of unrefined grains as a dietary staple, together with seasonal vegetables, seaweed, fish, and shellfish, while reducing intake of foods high in animal fats, sugar, and salt. This is exactly what traditional Japanese food is. The nutritionist Nanako Ogino, who is known as the author of *Taishibokei Tanita no Shain Shokudo (The Employee Cafeteria of Tanita, a Manufacturer of Body Fat Measurement Devices)*, had the following to say.

“Ingredients like seasonal vegetables and mineral-rich seaweed provide good nutritional balance. One of the characteristics of Japanese cuisine is a method of cooking that draws out ”umami” or a savory taste of the ingredients by adding flavorful broth.”

The McGovern Report is known as the first formal document that mentioned that dietary imbalances can cause illness. Since then, there has been substantial research done on preventing illness through diet, and initiatives have been undertaken and an overall awareness of health has blossomed. This trend fostered broad interest in Japanese food as “health food,” and cookbooks that use Japanese ingredients such as miso, tofu, and seaweed became common in bookstores throughout the U.S.

Around the same time, sushi also created a buzz in the U.S. Starting on the West Coast around Los Angeles, “healthy sushi” was appreciated as fashionable foreign food by Hollywood actors/actresses and the wealthy. The sushi boom spread to New York on the East Coast, and by the beginning of the 1980s, it had spread throughout the entire country. Nobuyoshi Kuraoka, president of the restaurant, Nippon, a Japanese restaurant in New York in business since 1963, said, “In the 1970s and 1980s, Americans began to build up a sense of ‘slim down beautifully,’ and in their search for low-calorie food, more and more people tried sushi.” However, at the time of this first wave of the sushi boom in the U.S., there were also many Americans who were repulsed by the idea of eating raw fish. Thus, locally created sushi roll variations such as the California Roll became popular. Starting from the mid-to-late 1980s, the sushi boom rippled across Europe and the rest of the world.

Hunger for the Realism

The surge in Japanese food has gone through qualitative changes, in keeping with the times. Based on various sources, JETRO broadly classifies the global Japanese food boom into three stages: (1) pioneer days, (2)

development period, (3) evolution of realism (see table).

The pioneer days were the period when the target customers of overseas Japanese restaurants began to shift from Japanese expatriates to the natives of the given country. In short, it was the dawn of localization (see the yellow sections of the table). As national income reached a certain level and as daily diet became more varied, a “health consciousness” began to grow. The characteristics of sushi fit in perfectly with that, triggering the first wave of the Japanese food boom. In addition to the U.S., regions where the pioneer days took hold relatively early include Great Britain, Germany, France, Brazil, and Hong Kong. Meanwhile, in Russia and emerging markets such as Southeast Asia, a Japanese food boom accompanied the acceleration of their economic growth from the late 1990s through the 2000s.

In the development period, Japanese food became more of a regular fixture on the local food scene (see the orange sections of the table). It became possible to locally procure ingredients that had formerly been available only by import and to locally produce items indispensable to Japanese food, such as flavorings and sake. It also became possible to offer a wider menu selection that went beyond sushi, at cheaper prices. Nobuyoshi Kuraoka reflected on the development period in the U.S. as follows.

“From the late 1980s, there was growing interest in soba (buckwheat noodles) and tofu as health food. That led me to create original menu items at my restaurant such as ‘salad soba,’ which is soba topped with salad. Also, I started to offer many Japanese food items in addition to sushi, including simmered foods, along with *fugu* (puffer fish) dishes which became a sensation after American food critics, etc., in New York referred to it as ‘the ultimate sashimi. It thus took hold in the consciousness of American customers.’”

Sushi had led the pioneer days of the Japanese food boom, and sushi, particularly sushi rolls, came to be sold at supermarkets and other retail shops. Sushi continued to garner mass appeal with the appearance of conveyor belt sushi restaurants, and local consumer understanding of sushi deepened. It was a period that saw an increase in sushi restaurants that were better suited to the lifestyle of the local consumers, accelerating sushi’s integration into ordinary life. Starting in the late 1990s in cities such as Shanghai and Beijing, multiple Japanese restaurants began to offer the popular “all-you-can eat and drink” menus. This updated the image of Japanese restaurants, which had been seen as too high-toned and difficult to enter for ordinary consumers, and brought Japanese food closer to ordinary people by making it seem an accessible foreign food.

As Japanese food became more accessible and as the number of consumers who could navigate Japanese menus increased, many customers began to search out Japanese food that they could consider “realistic.” This was the period of evolution to realism (see the green sections of the table). During this period, a stream of specialized Japanese food chains opened, offering foods such as ramen, udon (wheat noodles), and curry rice. “Realistic” Japanese food covers the wide range of food found in modern Japan, from the high-class genre that pays particular

attention to ingredients and quality to the so-called “B-grade” gourmet food. In fact, this includes everything from meticulously prepared multi-course feasts at high-end Japanese restaurants to so-called “Japanese Western food” such as hamburger-based dishes and curry rice, in addition to bread and cookies. In particular, Asian countries that are culturally close to Japan have been quicker to evolve toward “realistic” Japanese food than have Europe and Russia.

It was the rise in health consciousness that drove the popularity of Japanese food overseas and led to the sushi boom. Subsequently, the Japanese food boom underwent transformations, in keeping with the times, and now people mostly demand “realistic” food that is close to what is actually eaten in Japan. Thus, what has underpinned the long-lived popularity of Japanese food? It has been neither more nor less the strong image of Japan’s manufacturing-related technological capabilities, the esteem due to increased enhancement in which Japan’s cultural industries such as anime are held, and Japan’s long life expectancy. These have boosted the trust placed in the “Japan brand” and have thereby further heightened the popularity of Japanese food.

Collaboration with Adjacent Fields

In what direction will Japanese food in the overseas market move in the future? If one were to choose a keyword to express the direction, it would be “collaboration.” In short, collaboration between food and adjacent fields will further boost the recognition of Japanese food. To give an example, there could be a collaborative project with industries involved in illness prevention and treatment, such as health care services and the industry involved in measurement devices for the human body. (Note 2)

In the U.S., European, and emerging countries, where lifestyle diseases are a problem, daily habits that prevent disease should be inculcated, and thus we could encourage people to rethink their daily diets by suggesting Japanese food. Concurrently, we could try introducing Japanese measurement devices and recommend that people get in the habit of measuring their state of health.








In recent years, medical tourism has been flourishing, as people cross national borders in a search of better services to treat their illnesses in areas with medical expertise pertaining to their illness. Japan could consider promoting inbound medical tourism, with the selling points being Japan’s strength and its world-renowned technologies in cellular regeneration technologies and cancer treatment, as well as advanced devices for diagnostic imaging. It is worth studying the selling of “health” as part of the Japan brand, backed by Japan’s long life expectancy, to foreign travelers, and selling advanced health care in combination with the experience of Japanese food culture. Japanese food has the potential to open up new markets by creating linkage with non-food industries.

Tomomi Endo
Agriculture, Forestry, Fisheries and Food Research Division
Agriculture, Forestry, Fisheries and Food Department

Notes:

- 1) In December 2012, JETRO conducted the Survey of overseas consumers concerning Japanese Food. The survey covered 2,800 consumers in their 20s through 50s living in the seven countries and regions of China, Hong Kong, Taiwan, South Korea, US, France, and Italy. The survey asked (1) what foreign cuisines they like (including Japanese) and (2) their evaluation of Japanese sake, green tea, and other Japanese foods they like, etc.
- 2) Devices that measure the composition of the human body, such as body fat, muscle mass, and bone density.

Table: Changes in Japanese Food Overseas

	-1960s Japan's high economic growth period	1970s	1980s	Early 1990s	Late 1990s	2000s	2010s
US		1972 Nissin Food (Gardena, California) 1973 Kikkoman (Walworth, Wisconsin) 1975 Yoshinoya (Denver) 1977 Release of "Dietary Goals for the United States" (McGovern Report)	Late 1970s – 1980s Sushi boom arrives in US (Spread from West Coast to East Coast then to all of US) 	1994 Asahi Beer (Vancouver, Canada) Supplied mainly to US and Canada 1998 Kikkoman (Folsom, California)		Late 2000s - Ramen shops and sake drinking spots arrive in the US; popularity of soba increases. Many large upscale Japanese restaurants open (New York) 2000 Establishment of Ajinomoto Frozen Foods USA 2004 Santouka (US: Los Angeles, San Diego, New Jersey, etc.) 2005 Matsuya, Gyu-kaku 2008 Ippudo, Setagaya, Ichiran, etc. 	2011 Ringerhut CoCo Ichibanya (Los Angeles)
EU		1972 McDonald's (France) 1973 Kikkoman - DAITOKAI (restaurant) (Dusseldorf, Germany) 1974 McDonald's (Great Britain)	1981 McDonald's (Spain) 1982 Glico (France) Production of Pokki in French joint venture (MIKADO) 1985 McDonald's (Italy) 1988 HIGUMA, first ramen shop in Paris	1992 Kikkoman Trading (later JFC) established in UK (London, England) 1993 Nissin Food (Netherlands)	1997 Kikkoman (Netherlands) First sushi chain in Great Britain Yo!Sushi's first shop (London) NOBU (London, England)	2000 Asahi Beer (Czechoslovakia) Supplied to France, Italy, Germany, Eastern Europe 2005 Asahi Beer (Great Britain) Supplied mainly to London	2012 First shipments start of wasabi cultivated in Dorset, England 2013 4 ramen specialty shops (400 years of Japanese-British relations)
Russia	1970s (Soviet era) Japanese restaurants exist in upscale Moscow hotels			1990s Several Japanese restaurants opened, but they were so expensive that no one besides some high-wage earners could eat there 1990 McDonald's (Russia)	Late 1990s Japanese food boom begins 1999 First-shop Japanese food chain YAKITORIYA was born in Russia	2003 Increase in supermarket chains selling Japanese food (mainly sushi-related food) 2006 Government starts national project to improve people's health 2007 Udonya-san's first shop in Moscow 2008 Asahi Beer (St. Petersburg) Supplied to Europe, Russia and surrounding area	2013 Marugame Seimen 
China (Hong Kong)			1980s Increase in Japanese-style restaurants 1981 Nadaman 1984 Nissin Food 1985 Aeon Stores Hong Kong, Uny Hong Kong opened	1990s Japanese restaurants became well established with the boom in Japanese anime and dramas, and a sushi and ramen boom started as well. 1991 Yoshinoya 1995 Genki Sushi	Late 1990s Long-established, upscale Japanese restaurants pulled out one after the other	2000s Japanese restaurants, specialty food shops, and pub chains in a low price range became well established 2003 Nihon-Ramen Yokocho (6 shops including Santouka, closed as of 2013) 2004 Warawara, Tsukiji-Gindako 2005 NOBU, Moss Burger	2010 CoCo Ichibanya, BUTAO, Gyu-kaku 2013 Marugame Seimen, Tomizawa Corp. (retail cooking ingredients)
China (Shanghai, Beijing)				Late 1980s – Early 1990s Japanese-style restaurants increase in cities such as Shanghai and Beijing 1990 McDonald's 1992 Yoshinoya (Beijing) 1994 Nissin Food (Guangdong)	1996 Ajinomoto Frozen Foods (Jiangsu) 1999 Asahi Beer (Shenzhen) Supplied to South China region and Shanghai	2000s Japanese restaurants, specialty food shops, and pub chains in a low price range became well established 2002 Kikkoman Supplied to Shanghai 2004 CoCo Ichibanya (Shanghai), Matsuya (Shanghai) 2005 Asahi Beer (Beijing) Pepper Lunch (Beijing), Watami (Shenzhen) 2009 Kikkoman Supplied to Beijing and Tianjin	
Southeast Asia			1980s Japanese restaurants began to open in upscale hotels (Thailand, Singapore) 1982 McDonald's (Malaysia) 1984 Kikkoman (Singapore) 1985 McDonald's (Thailand)	1990s Acceleration of Japanese company's advance (Thailand) Increase in Japanese restaurants aimed at expatriate Japanese employees 1991 Nissin Food (India) 1993 Acecook (Vietnam) 1993 Nissin Food (Thailand) 1996 Ajinomoto Frozen Foods (Thailand) McDonald's (India)		2000s Japanese restaurants, specialty food shops, and pub chains in a low price range became well established; a ramen boom also arrived (Thailand, Singapore) 2000 Genki Sushi (Thailand) 2002 Asahi Beer (Khon Kaen, Thailand) Supplied mainly to Thailand and surrounding ASEAN countries 2005 Ajinomoto Frozen Foods (Thailand) (processed pork products, dumplings, etc.) Ootoya (Thailand), Pepper Lunch (Singapore) 2006 Pepper Lunch (Indonesia) 2007 Pepper Lunch (Thailand) 2008 Pepper Lunch (Malaysia)	2010s Japanese-style western food boom: a series of openings of Japanese pasta shops and bakeries (Singapore) Greater diversity of genres such as low-price Japanese restaurants and specialty food shops; a ramen boom also arrived (Malaysia, Indonesia) 2010 Kanezin (Singapore) Noodle production Ringerhut (Thailand) Yoshinoya (Indonesia) 2011 Marugame Seimen (Thailand), Yoshinoya (Thailand) CoCo Ichibanya (Singapore) 2013 Santouka (Thailand) Marugame Seimen (Indonesia)
Brazil		Late 1970s – 1980s There previously were Japanese restaurants for Japanese-Brazilians, but during this period, Japanese restaurants spread to the rest of Brazilian society. 		Early 1990s Import deregulation started in the early 1990s; Japanese restaurants in shopping centers increased		2000 Ramen Asuka 2006 KONI's first shop, the first hand-rolled sushi chain in Brazil (48 shops as of October 2012) 2008 Ramen Kazu	2010 Sukiya (San Paulo) 

Red letters: Japanese-owned company begins local production
Blue letters: Japanese restaurants and fast food restaurants open
Yellow arrow: Pioneer Days
Red arrow: Development Period
Green arrow: Evolution of "Realism"

Note: Some of the locations listed here have already closed. McDonald's is listed as a point of reference for the opening of foreign food chains.
Source: Prepared by JETRO based on various materials in the public domain.